



Good Practice on Project Development and Management

Emilie HOCHART

European Intern

External Funding Team

Business Services Department

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FOREWORD

The aim of this handbook is to help your organisation during the development of your project and then during its management once it has been awarded a grant.

The first part of this handbook will support you with preparing your project as effectively as possible, before the application process. You will learn how to define the project and how to identify relevant co-funding programmes.

Project management may overwhelm you, but this handbook will show you that it can be accessible when you follow some rules. You will be an expert after reading the second part!

Even if European projects need more efforts to be managed, this guidance will help you both for projects granted by national grants or charities and projects co-financed by European funds.

Finally, the handbook will show you that European grants are as accessible to every eligible organisation just like national grants or grants from a charity.

The “*Good Practice on Project Development and Management*” guide was written by Emilie Hochart, our European Intern at East Sussex County Council from January to June 2014. This placement formed part of her MA in EU Project management at the University of Picardy Jules Verne in Amiens, France., which she has now completed.

She is specialised in European co-funding programmes and project management, from the very beginning to the end of project implementation including the application process.

You can find out more about project management and European funding on her blog:
<http://projets-europeens.blogspot.co.uk>

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PROJECT DEVELOPMENT

1

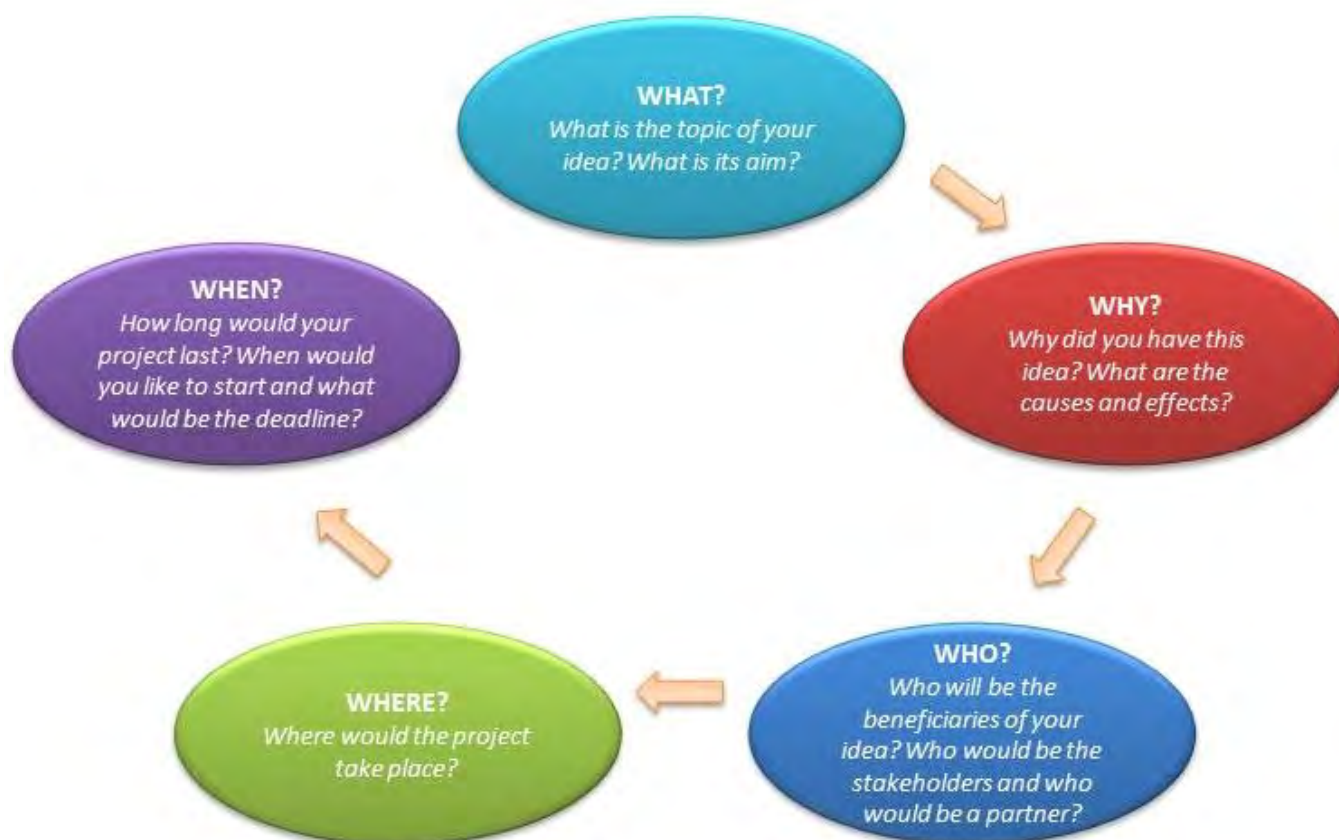
The idea

An idea: a thought that leads to another one...

You may have experienced a situation or faced an issue which highlighted a specific gap that you could fill. Or you may want to share your experience and your knowledge in a specific sector with a partner or a specific audience.

Every project is always set up within a specific context or for a specific reason.

The first step is to precisely define your idea.
To help you, you can answer these short questions:



The development phase of the idea may seem obvious and easy, and you may want to skip this, but taking the time to think about it can help you save time later and more importantly make the bid writing much easier.

Case study

The ABC organisation aims to introduce children to the pleasure of reading in schools. They would now like to share good practice with a similar voluntary organisation in a European or Partner Country.

The definition of their idea could be as follows:

WHAT: reducing illiteracy among children

WHY: because illiteracy can lead to social issues, to ensure equal opportunities and a better quality of life

WHO: beneficiaries = children, partners = schools, voluntary organisations, libraries

WHERE: schools, youth groups, EU or Partner Countries

WHEN: duration = 1 school year, start: Sept/Oct; end: June

2

From the idea... to the project

Step by step, one goes far.

Once you have defined your idea, you need to carry out some research on, i.e. what the needs are and how your project will address them.

This step will allow you to build a solid basis for your project, to get a good knowledge of its objectives and the activities you will carry out, and finally to measure the issues that you might face during the project's implementation. Identifying funding opportunities will then be easier and you will be better placed to "sell" your project.

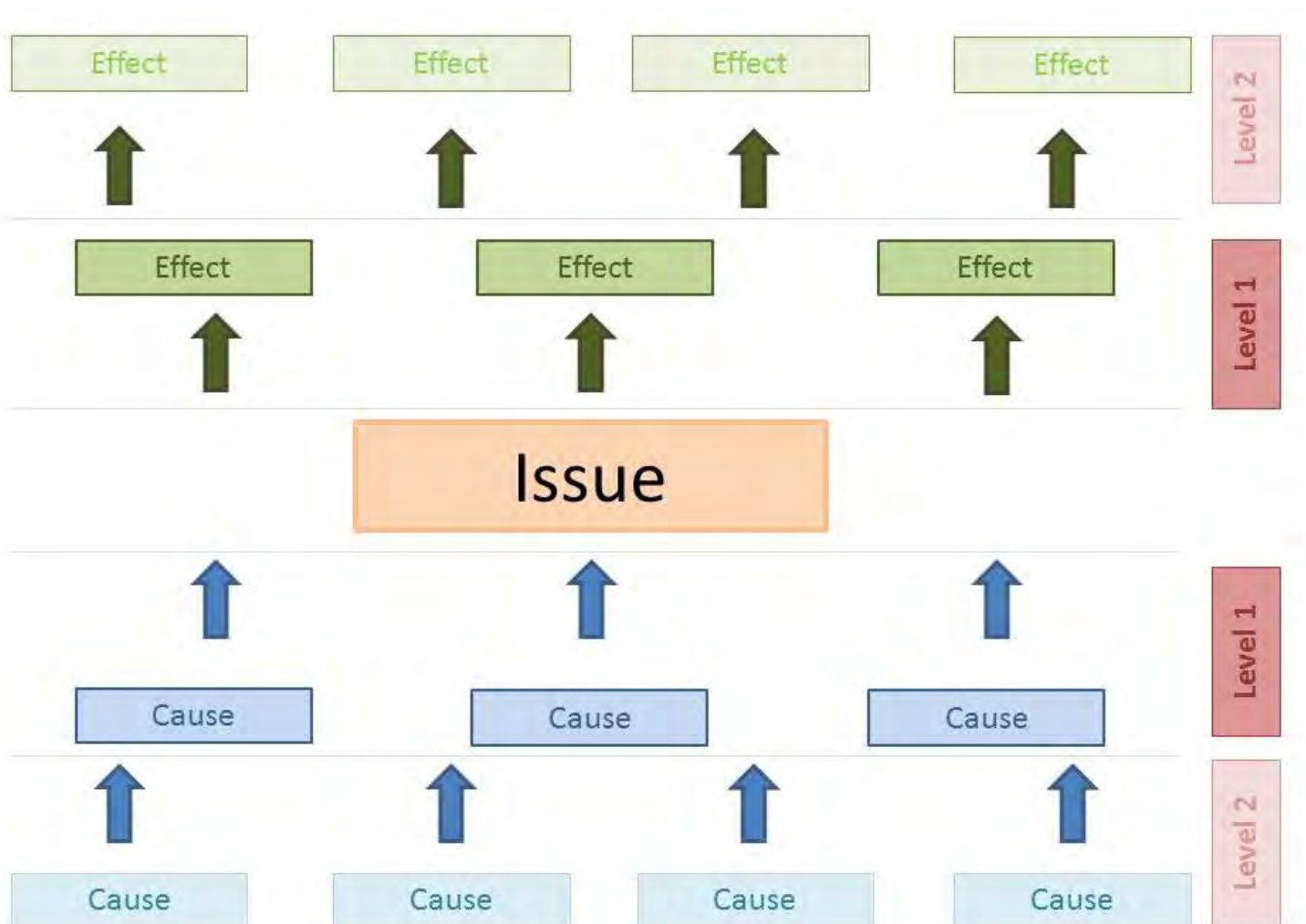
Various tools are available to help you with this step. Among those you have:

- **the root cause analysis:** to identify the causes and effects of the issues that inspired you;
- **the state of the art analysis:** to identify the situation before your project starts;
- **the SWOT analysis:** to identify the strengths, weaknesses, opportunities and threats of your project;
- **the logical frame:** to identify the general objective, the specific ones and the actions of your project.

These are template planning tools that you can use to methodically plan your project.

1/ The root cause analysis

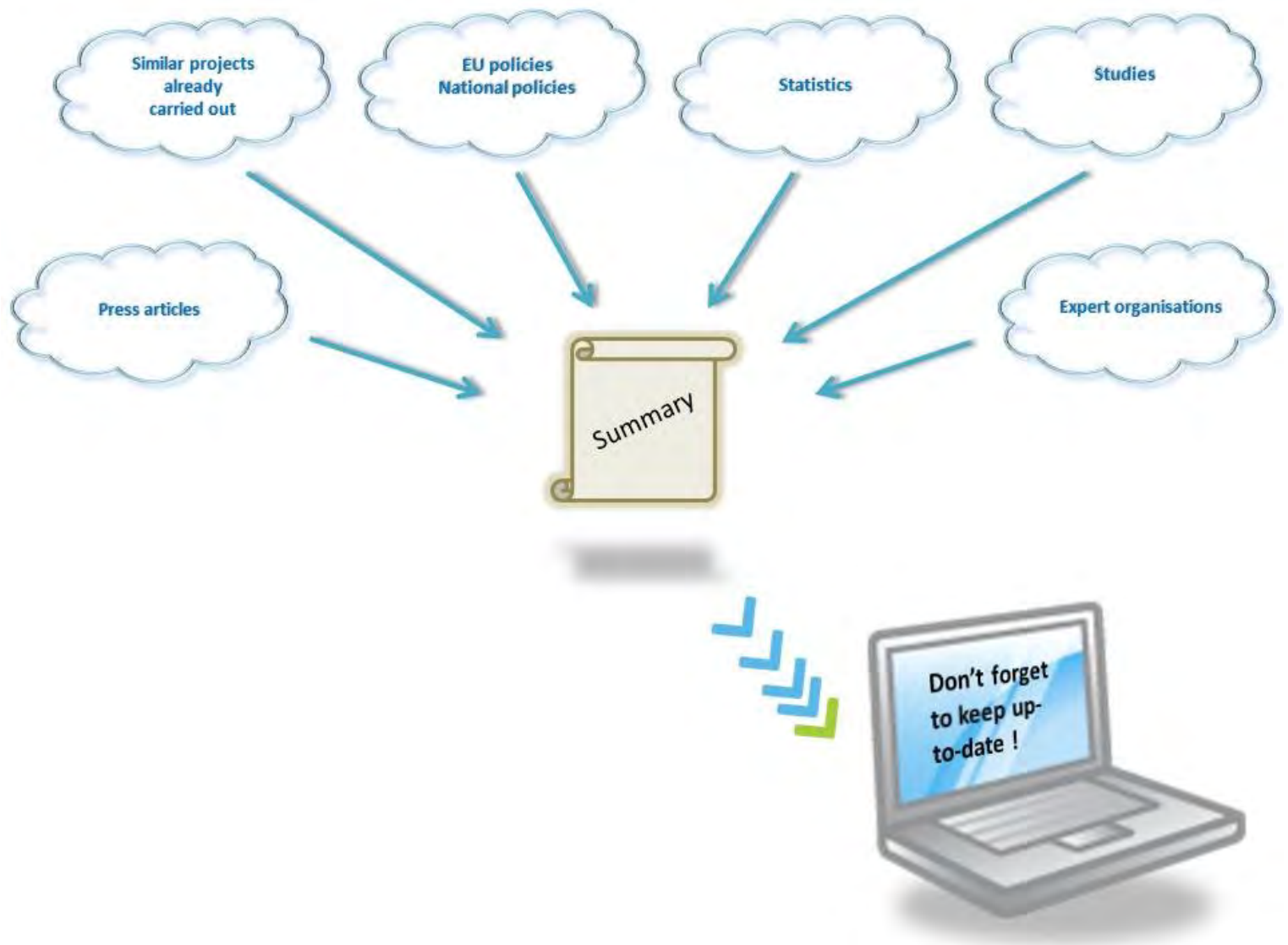
This tool aims to identify the causes of the issue that inspired your idea to develop the project as well as its effects. The root cause analysis will help your project to tackle the more relevant issues and to create a greater impact.



2/ The state of the art analysis

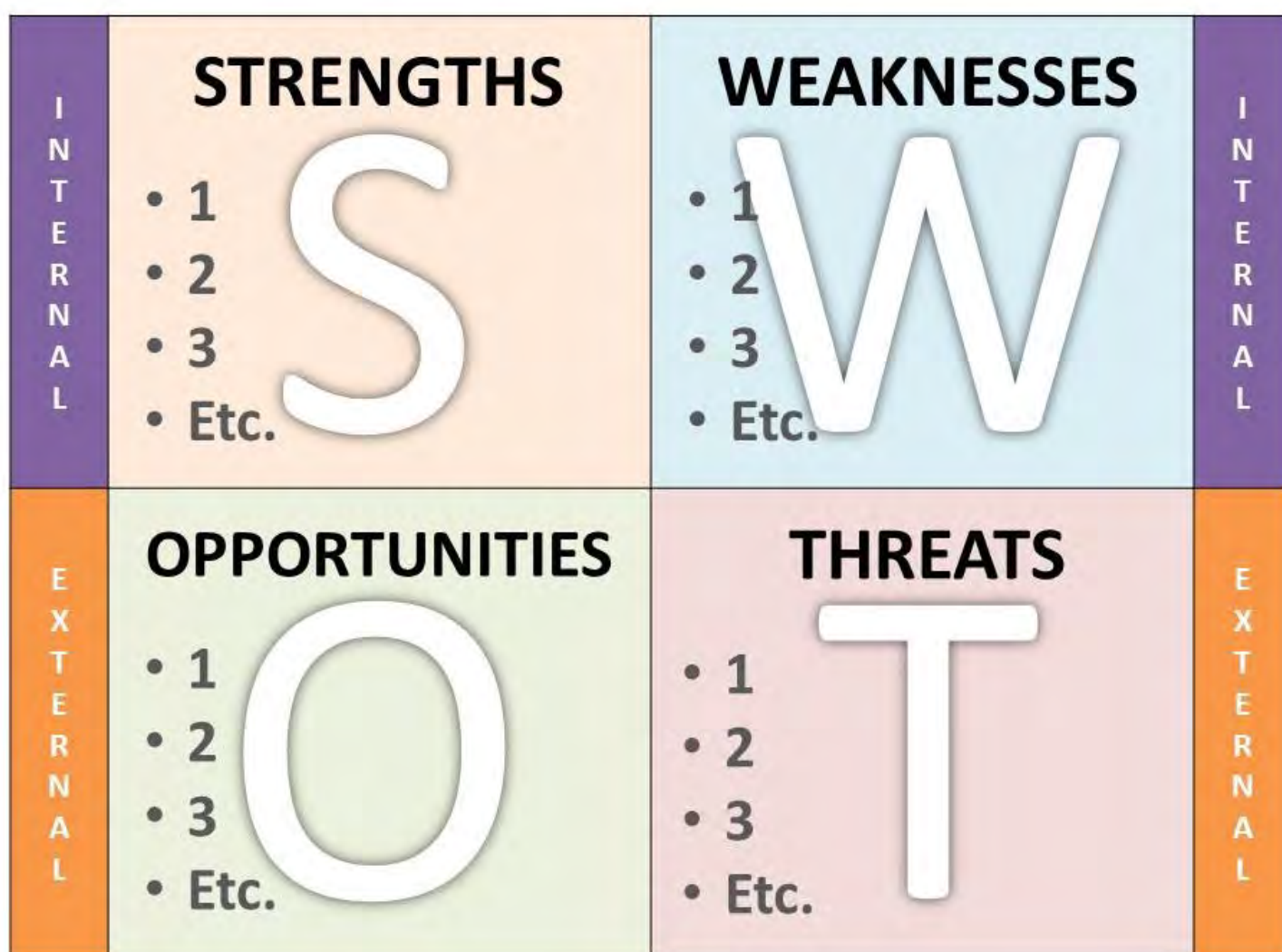
This analysis aims to evaluate the state of knowledge already available. Firstly, you need to identify similar projects that have already been carried out at a local, national, European or international level, You can then identify the current EU or national policies related to your sector, and gather statistics and/or studies that will support your application.

You can then pull your data together and you will get your state of the art analysis !



3/ The SWOT analysis

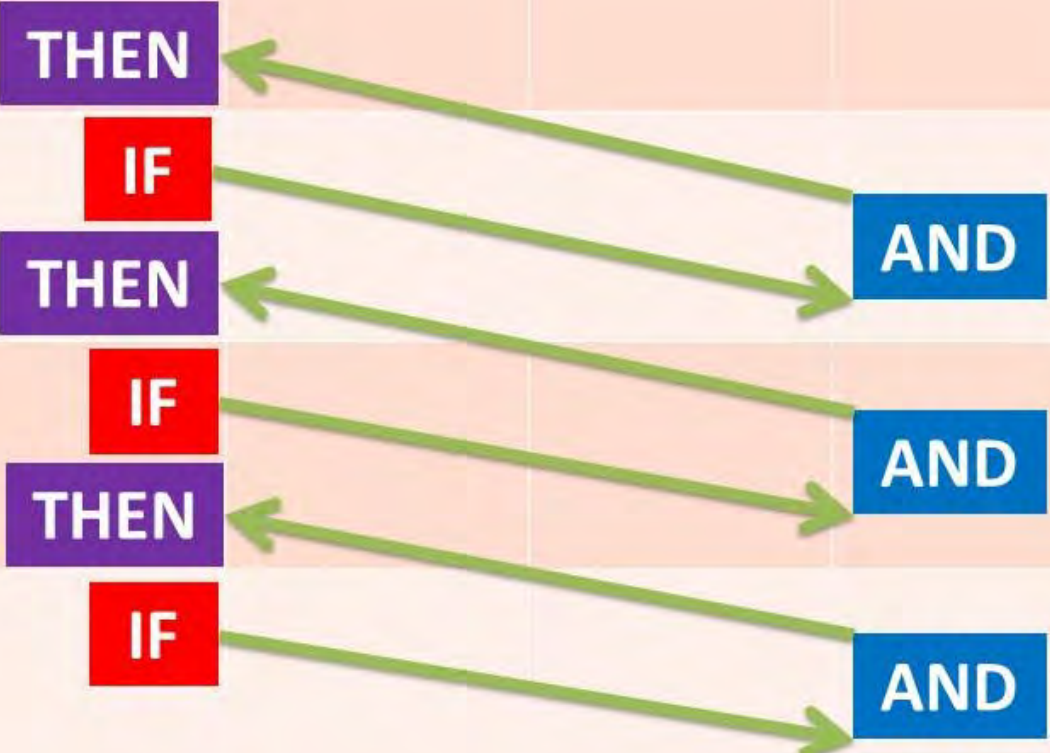
A SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis will help you identify your project's strengths and weaknesses. You can then identify opportunities and threats that your project might face during implementation.



4/ The logical frame

Once you have carried out the previous analysis, you will be able to work on the logical frame. You need to start from the bottom row of the table from the left to the right and you can then fill in the upper row. In other words, you begin from the more specific details to the more general ones.

	PROJECT SUMMARY	SETTING INDICATORS	MONITORING INDICATORS	ASSUMPTIONS
	Description	Indicators to check the good implementation of the project	How to check the indicators?	Assumptions regarding the implementation of the project
GOAL Main objectives of the project	7			X
OUTCOMES Specific objectives of the projects	5	THEN		6
		IF		AND
OUTPUTS Results of the activities	3	THEN		4
		IF		AND
ACTIVITIES Activities to be carried out during the implementation of the project	1	IF		2
				AND



5/ Evidence of need

You must be able to clearly demonstrate why your project is needed and how it fits into the priorities of the funder in order to secure the grant.

You must be able to show **how users have been involved** in project development and how their views or feedback have helped to shape the project. This involvement is likely to make your project more effective and responsive, and will help you to show why your project is the best way to meet the particular needs of your target group. If it is not appropriate to involve users in this way, you must say why this is.

You need to produce data, literature or records to **back up your statements**. Some useful sources for information to support the need for your project may include:

You: your own observations or experience

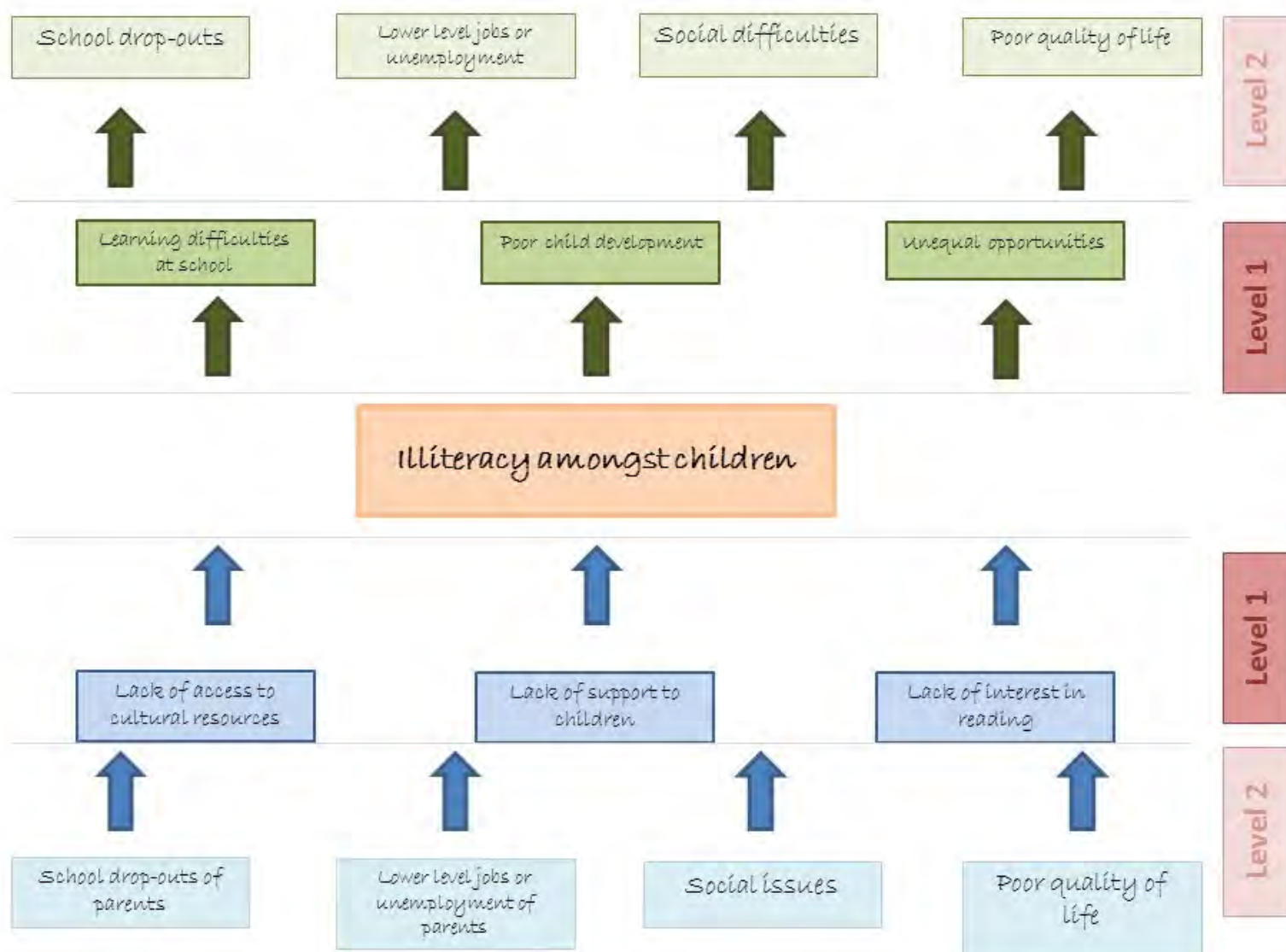
Consultations: who has been consulted and what have they said? For example, relevant service providers; members of the community; members of the target group

Previous reports, projects and Research: such as needs assessment

Databases: with information such as demographic profile of your area, service usage or other projects. A good source of information in East Sussex is through East Sussex in Figures
<http://www.eastsussexinfigures.org.uk/webview/welcome.html>

5/ Case studies

Case study 1— ABC's root cause analysis



Case study 2— ABC's state of the art analysis

Illiteracy amongst children - *State of the art analysis*

PRESS ARTICLES

[Children 'still blighted by Dickensian-style illiteracy'](#); The Telegraph, 07/02/12

Currently, as many as one-in-six pupils struggle to read when they leave primary school and one-in-10 boys aged 11 has a reading age no better than a seven-year-old. At the age of 14, six-in-10 white boys from the poorest backgrounds are still unable to read properly, figures show. Last year, a major survey by the Confederation of British Industry found more than four-in-10 employers were dissatisfied with levels of English among school leavers.

[Literacy progress has stalled, Ofsted's chief inspector says](#); BBC News, 15/03/12

Reading standards had not improved since 2005, he said, and one in five 11-year-olds did not make the grade. Sir Michael said one in five children - about 100,000 - were not reaching the standard expected (level 4) at the end of primary school every year. And even those who did make that grade had no guarantee of going on to get a good GCSE pass in English, he said.

"Without reading and writing skills they find it difficult to access the curriculum and achieve well in their examinations. As a result, too many young adults lack the functional skills to make their way in the modern world. They are more likely to be unemployed, unwell, in prison, or supported by the state."

[Reading to dogs to boost children's literacy in Frome](#); Frome Times, 11/02/2014

Author Anna Wilson met with the children on Thursday 6th February which coincided with National Storytelling Week. Reading to dogs can not only help with literacy, but also improves children's self-confidence. Anna Wilson said, "Reading aloud and storytelling have always been very important to me. As an author, I go into schools and see how reading stories aloud can help build confidence and improve literacy skills. Reading to dogs is a fantastic, innovative idea – it will help boost the confidence of children who are nervous of reading aloud in front of a class, for example, and will encourage a lifelong love of books and reading, I'm sure. I frequently read to my own dog when I am trying out new passages of writing, so I can highly recommend it!"

[Government to set stricter new literacy and numeracy targets in primary schools](#); The Independent, 30/01/2014

From next year, they will be expected to get 85 per cent of their pupils to reach the required standard in English and maths national curriculum tests for 11-year-olds - instead of 60 per cent as at present. He told a conference organised by the Westminster Education Forum: "With such a high bar there are going to be many, many pupils who won't even come close to that target - so what is going to happen to them?"

[Save the Children takes literacy campaign to House of Lords](#); The Bookseller, 21/01/2014

The campaign is aimed at stopping poor children in the UK from falling behind on their reading. The event came out of a partnership, launched last year, with literacy charity Beanstalk. Together the two charities created the Born to Read programme which recruits volunteers to go into schools to help children who are falling behind. According to the partnership, 93% of children who leave primary school without basic reading skills fail to get five good GCSEs. Sue Porto, Beanstalk chief executive, said: "Reading is key to a child's future and underpins a child's chances of achieving at school and later in life."

SIMILAR PROJECTS ALREADY CARRIED OUT

BIG LOTTERY - Awards for All

Holy Family and St Michael's Catholic Primary, Pontefract **£4,360**

This school will use funding to run lunchtime and after school sporting activities, to include practical and theory sessions, for pupils of the school. This will encourage children to participate in physical activities, with the aim of improving their health, along with their literacy and numeracy skills.

Grange Primary School **£9,945**

This school will use the funding to provide English, maths, finance classes and employment advice to parents. This will allow parents to obtain basic literacy and numeracy skills allowing them to become more confident, less isolated, improve their employment prospects and take more of an interest in their child's education.

Vale Park Community Initiative **£9,670**

This group will use the funding to develop and extend a previously successful project to engage vulnerable community members, such as older people suffering from dementia, disabled families and school children and impact on vital life skills, in particular, literacy. This will help improve the poor standards of literacy and low levels of confidence and aspirations in the beneficiaries of the local community that are contributing to academic underachievement.

EU funds

University of Greenwich - Promoting Employability through Specific Literacies (2013-2014)

University of Greenwich received a £34,000 grant through Lifelong Learning / GRUNDTVIG programme to run a week-long Workshop which will present a series of seminars sharing teaching and learning strategies in adult literacy to promote employability. Playing host to adult literacy teachers from a variety of different education settings in Europe, the Workshop aims to enable adult literacy teachers to design literacy curricula to meet the needs of both learners and employers.

The workshop will pull together ideas relating to literacy for specific purposes (LSP) across Europe and seek to develop a pan-European funded project from it. The ultimate goal is to develop a pan-European congress on applied literacy research and practice. This would enable cross-fertilisation of ideas across Europe, sharing of good practice and collaborative research. An initial development of this idea is the invitation of Dr Ade-Ojo to University U-PEC in France for a series of lectures.

LITERACY Project

The Literacy project is a European wide research project funded by the European Commission in the area of ICT under the FP7 Programme.

The aim of this 36-month project launched in 2012 is to create an advanced online portal to support the inclusion of dyslexic youth and adults in society. This will be done by providing personalized e-learning programs and tools for managing tasks at home, work or school.

Led by Indra Sistemas (Spain), it will be implemented by collaboration of seven partners from five countries in the EU and Associated countries.

UNITED NATIONS / EU / NATIONAL POLICIES

International

“Promoting literacy for all as a tool for personal empowerment and social and human development”

Literacy is at the heart of basic Education for All, and essential for eradicating poverty, reducing child mortality, achieving gender equality and ensuring sustainable development, peace and democracy.

Since its foundation in 1946, [UNESCO](#) has been at the forefront of global literacy efforts and is concerned with keeping literacy high on the agenda regionally, nationally and internationally.

UNESCO also run an annual [International Literacy Day](#).

European Union

Addressing learning difficulties in reading is a widespread educational concern in Europe. Latest [international surveys](#) in reading point to significant numbers of low achievers both among fourth grade pupils at primary level and 15-year-old students. The issue of struggling readers is a much greater problem in some countries than in others. In this context, the EU Member States have established a benchmark which calls for the proportion of 15-year-old low achievers in reading to be reduced to under 15 % by 2020.

UK

National curriculum assessment

To improve literacy standards early so all pupils develop their enjoyment of reading and are able to access the rest of the curriculum, we will:

- make sure all pupils take a statutory phonics screening check at the end of year 1 to identify those that need additional support
- from 2013, introduce a second phonics screening check in year 2 for pupils whose results were below the level expected in the year 1 check

To raise standards for all children, we will:

- introduce grammar, punctuation and spelling tests from 2013 for all pupils at the end of key stage 2

To give schools greater freedom, we will:

- remove the current system of national curriculum levels so that schools have the freedom to design their own assessments against the new national curriculum

www.education.gov.uk

NATIONAL STATISTICS

- One in six people in the UK struggle with literacy. This means their literacy is below the level expected of an eleven year old.
- An estimated 370,000 parents in London struggle with literacy – this means that around 1 in 5 mums and dads may not be able to read confidently with their children.

Attitudes towards reading and writing

- 22.2% of young people aged eight to sixteen say they enjoy reading very much and 28.4% say they enjoy it quite a lot. 39.2% say they like it a bit and 10.2% say they do not enjoy reading at all.
- 66% of adults believe that the ability to read, write and communicate is a fundamental right in modern society.
- 92% of the British public say literacy is vital to the economy, and essential for getting a good job.
- A quarter of children and young people do not recognise a link between reading and success.
- Children and young people who engage in technology based texts, such as blogs, enjoy writing more and have more positive attitudes towards writing – 57% express a general enjoyment of writing vs. 40% who don't have a blog.
- There is a consistent gender difference in attitudes towards writing. Boys do not enjoy writing as much as girls (38% vs.52%), either for family/friends or for schoolwork and are more likely to rate themselves as 'not very good writers' (48% vs. 42%).
- Technology based materials are the most frequently read, with nearly two thirds of children and young people reading websites every week, and half of children and young people reading emails and blogs/ networking websites (such as Bebo, MySpace) every week.

Educational attainment over the last ten years

Trends in literacy attainment over the last ten years can be seen in the achievement of children at age eleven.

- At Key Stage 2 (age eleven) the percentage of young people achieving the expected levels for reading increased by 8 percentage points over ten years, from 78% in 1999 to 86% in 2009. In 2010, there was a slight drop of 2 percentage points. Overall levels remained the same in 2011.
- The percentage of young people reaching expected levels for writing increased from 54% in 1999 to 67% in 2006. However, from 2006 to 2009 levels plateaued and the percentage remained the same (67%) three years later. The percentage of young people reaching expected levels for writing increased by 4 percentage points in 2010, and further increased by 4 percentage points in 2011.
- The percentage reaching the expected levels in English increased from 70% in 1999 to 80% in 2009. Levels increased by 1 percentage point in 2010 and again increased by another 1 percentage point in 2011.

http://www.literacytrust.org.uk/assets/0001/2847/Literacy_State_of_the_Nation_-_2_Aug_2011.pdf

In the UK, people with poor literacy have the lowest levels of employment and are more likely to be in manual jobs. Also, improved literacy rates show that (all data from the National Literacy Trust):

- The likelihood of employment and higher wages increases
- The likelihood of a person using a computer at work (an indicator of a job role requiring more professional skills) rises from 48% to 65%
- The likelihood of a man owning a home (an indicator of earning capacity) increases from 40% to 78%

In this report, an estimate of over £81 billion has been put on the cost of illiteracy to the UK. One can put figures on the social cost in terms of welfare payments or the burden on the health system. But the real opportunity cost will never be known. These are the costs of lost opportunities to create individual financial wealth, encourage entrepreneurs, build healthier and more stable families whose members can make a productive contribution to all areas of society (political and cultural as well as economic).

www.worldliteracyfoundation.org/interim-report.html

STUDIES

[What works for children and young people with literacy difficulties?](#) - Greg Brooks Emeritus Professor of Education, University of Sheffield

- Ordinary teaching ('no treatment') does not enable children with literacy difficulties to catch up.
- Schemes for KS3 are few, but several work well for reading, and Grammar for Writing has great potential.
- Schemes for children who struggle with spelling work best when highly structured.
- Work on phonological skills for reading should be embedded within a broad approach.
- Children's comprehension skills can be improved if directly targeted.
- ICT approaches work best when they are precisely targeted.
- Large-scale schemes, though expensive, can give good value for money.
- Where reading partners are available and can be given appropriate training and support, partnership approaches can be very effective.
- Good impact – sufficient to at least double the standard rate of progress – can be achieved, and it is reasonable to expect it.

Children who read for pleasure are likely to do significantly better at school than their peers, according to new research from the Institute of Education (IOE).

The IOE study, which is believed to be the first to examine the effect of reading for pleasure on cognitive development over time, found that children who read for pleasure made more progress in maths, vocabulary and spelling between the ages of 10 and 16 than those who rarely read.

The research was conducted by Dr Alice Sullivan and Matt Brown, who analysed the reading behaviour of approximately 6,000 young people being followed by the 1970 British Cohort Study, which is funded by the Economic and Social Research Council. They looked at how often the teenagers read during childhood and their test results in maths, vocabulary and spelling at ages 5, 10 and 16.

www.ioe.ac.uk/89938.html

EXPERTS ORGANISATIONS

National Literacy Trust

The National Literacy Trust is a national charity dedicated to raising literacy levels in the UK. We work to improve the reading, writing, speaking and listening skills in the UK's most disadvantaged communities, where up to 40 per cent of people have literacy problems. Our research and analysis make us the leading authority on literacy and drive our interventions. Because low literacy is intergenerational, we focus our work on families, young people and children.

- We establish literacy projects in the poorest communities
- We campaign to make literacy a priority for politicians and parents
- We support schools

Springboard

Springboard for Children believes every child has the right to a fair chance of future success. Springboard is a charity providing one-to-one support to improve reading and writing for children who are in danger of being left behind in the education system. We only work one-to-one with children and we always work in partnership with schools.

UKLA

The United Kingdom Literacy Association (UKLA) is a registered charity, which has as its sole object the advancement of education in literacy. UKLA is concerned with literacy education in school and out-of-school settings in all phases of education and members include classroom teachers, teaching assistants, school literacy co-ordinators, LEA literacy consultants, teacher educators, researchers, inspectors, advisors, publishers and librarians.

SUMMARY

Illiteracy amongst children is a big issue in the UK. Figures show that one-in-six pupils still have difficulties to read when they leave primary school, and more than four-in-ten employers are dissatisfied with levels of English among school leavers. Indeed, even if pupils make the grade at the end of primary school, there is no guarantee they will get good GCSEs.

There are some innovative approaches like making children reading to a dog to improve their self-confidence. Moreover, the literacy charity Beanstalk launched in 2013 the *Children takes literacy* campaign to stop poor children in the UK from falling behind on their reading. Children are more likely to increase their literacy skills when they read for pleasure.

Many projects at a national or European level have been or are currently being carried out. Some of their activities are more focused on adults because some parents do not have good literacy skills and are not able to help their children.

The UK government has just set some stricter targets for children at school regarding their literacy and numeracy skills. At the European and international levels, literacy remains a priority to ensure equality and better quality of life for children.

Literacy is considered as a priority to get a job and more specifically a higher level one. Quality of life is better when people have a job requiring more professional skills; illiterate adults have more chance to be unemployed, in prison or supported by the state. The cost of illiteracy in the UK is estimated at £81 billion.

Expert organisations acting in the UK are numerous. Among these there are National Literacy Trust, Springboard, and UKLA.

Case study 3—ABC's SWOT analysis

I N T E R N A L	<h2 style="text-align: center;">STRENGTHS</h2> <div style="text-align: center; font-size: 4em; opacity: 0.5;">S</div> <ul style="list-style-type: none"> • In-depth experience with children • Good results locally • Strong local network 	<h2 style="text-align: center;">WEAKNESSES</h2> <div style="text-align: center; font-size: 4em; opacity: 0.5;">W</div> <ul style="list-style-type: none"> • Lack of innovation (method) • Need for a new and more efficient partnership • Lack of experience in project development and management 	I N T E R N A L
E X T E R N A L	<h2 style="text-align: center;">OPPORTUNITIES</h2> <div style="text-align: center; font-size: 4em; opacity: 0.5;">O</div> <ul style="list-style-type: none"> • High demand from parents • Good practice sharing with partners • Support from government and the European Union (priority) 	<h2 style="text-align: center;">THREATS</h2> <div style="text-align: center; font-size: 4em; opacity: 0.5;">T</div> <ul style="list-style-type: none"> • Lack of interest from children • Difficulties to manage the partnership • Lack of communication 	E X T E R N A L

Case study 4 - ABC's logical frame analysis

	SUMMARY	INDICATORS	INDICATORS	
	Description	Indicators to check the good implementation of the project	How to check the indicators?	Assumptions regarding the implementation of the project
GOAL Main objectives of the project	<ul style="list-style-type: none"> Better quality jobs Unemployment decrease Improved quality of life 	<ul style="list-style-type: none"> Rates 	<ul style="list-style-type: none"> Surveys 	
OUTCOMES Specific objectives of the projects	<ul style="list-style-type: none"> School drop-outs decrease Better quality education 	<ul style="list-style-type: none"> Rates 	<ul style="list-style-type: none"> Surveys 	Children want to carry out school, even after graduating
OUTPUTS Results of the activities	<ul style="list-style-type: none"> Children increase their abilities Better results at school Children increase their self-confidence 	<ul style="list-style-type: none"> School results Attendance rate at school 	<ul style="list-style-type: none"> Exams results Drop-outs rate within the school Attendance records 	Children have greater interest for school
ACTIVITIES Activities to be carried out during the implementation of the project	<ul style="list-style-type: none"> Workshops at school (+ workshops with parents) Visits to libraries Professional storyteller visits at school Correspondence between schools 	<ul style="list-style-type: none"> Number of mainstreamed pupils Number of activities Interest of children for activities 	<ul style="list-style-type: none"> Attendance records Children's registrations at the library Number of letters sent between schools 	Parents are interested by the activities and support their children

3

How to identify funding streams

Every little helps...

Once you have done a complete analysis of your project and identified its objectives and activities, it will be easier for you to identify funding opportunities.

Obviously, the best funding opportunity remains one's own funds, but it is quite difficult to have enough money to finance a project as a whole. Most funders will also ask you to part fund your project. You will therefore need to adapt the scale of your project to the size of your organisation and its finances. Your organisation needs to be able to meet terms and conditions of the funders, right to the end of the project.

There are lots of funding opportunities available at a local, national, European or worldwide level. In this chapter, you will learn how to identify the different topics of your project and how to find relevant funding opportunities according to these topics.

Note

You may have decided to develop your project according to a specific co-funding programme or a specific grant in a certain field. If your project is a smaller-scale one, you can skip this step.

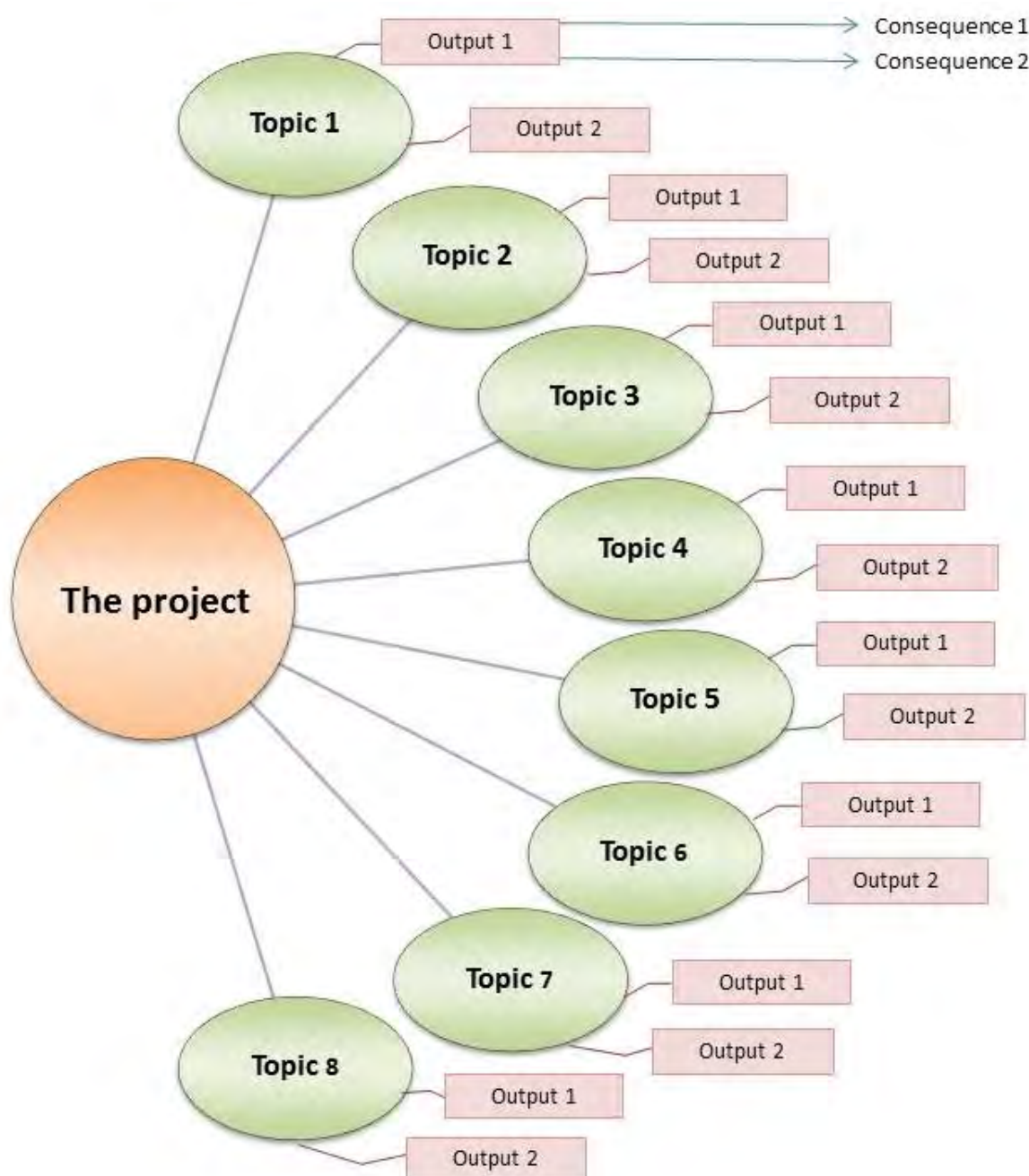
But if it is a larger-scale one, it could be interesting for you to identify additional funding opportunities*. In such a case, you may want to split the overall project into different parts i.e. smaller projects according to the topics or the time frame of the project's implementation.

* Adding up different funding streams for the same project is called "**match-funding**" i.e. your organisation will be granted by one funder with a certain percentage of the total costs of your project and you will have to finance the rest.

For example: The total costs of the project is 100%. The EU will give you 60%. The Big Lottery will give you 20% and your own resources will finance the last 20%.

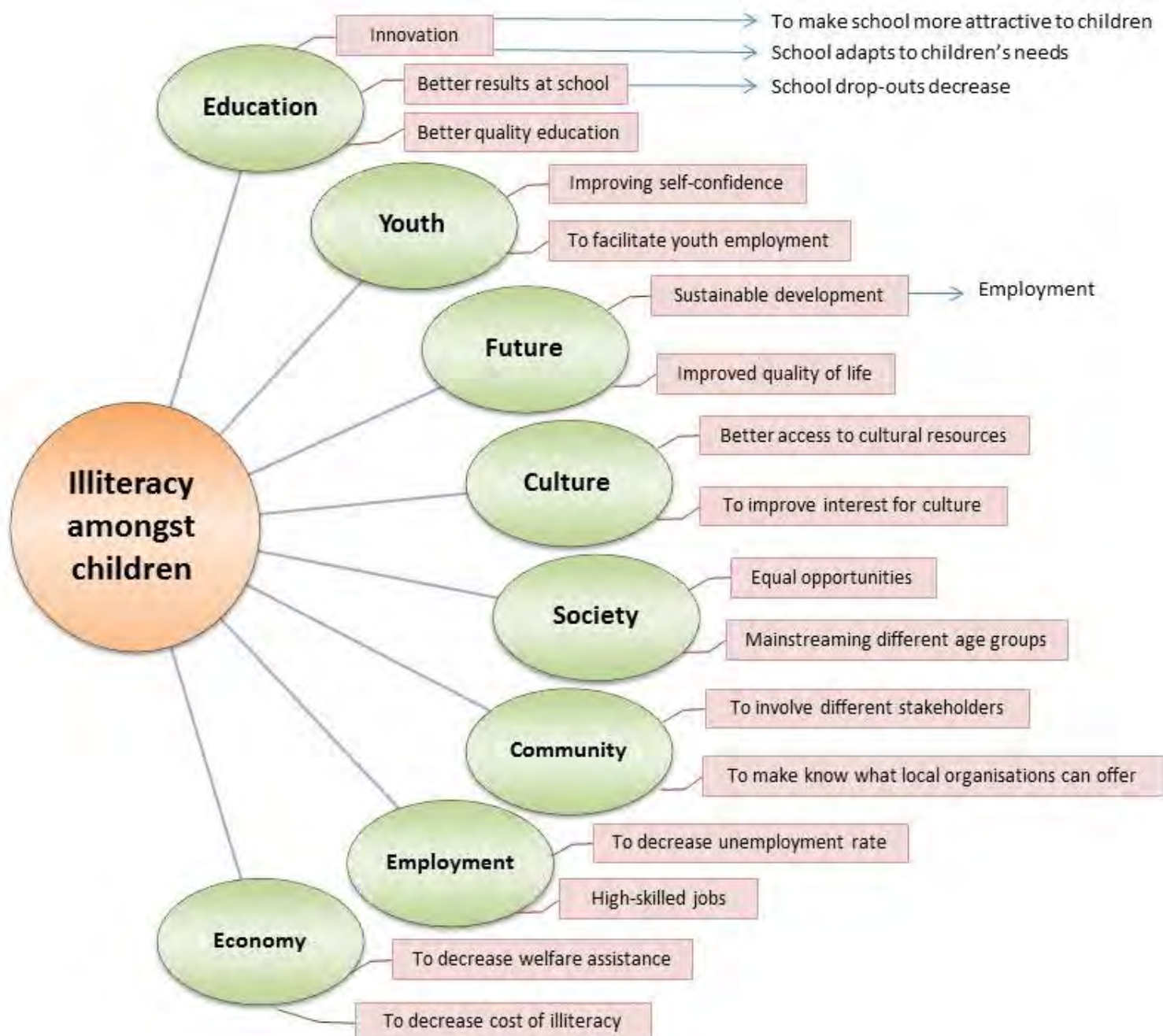
1/ Brainstorming

Brainstorming will help you identify the different topics that your project could tackle during its implementation. Under each topic, you will have to think about the outputs of your project. It might be worth to think in the long term.



Case study

The brainstorming of ABC's project could be as follows:



2/ Finding the funds

For this next step, the internet will be your best friend. You have three possibilities to get some funds for your project:

- 1) your own resources;
- 2) National grants or charities;
- 3) EU co-funding programmes.

Your own resources are the easiest way to fund your project giving you total freedom to manage the money the way you like.

Nobody has enough money to fund their project, that is why you will need to apply for grants. Firstly, you can look for local or national funding opportunities by carrying out an internet search using keywords like “*youth education grants uk*” or “*culture grants east sussex*”, etc.

There are also about 40 EU co-funding programmes according to a specific topic that each one covers. You can have a look at the table on the next page to have a quick overview of the EU funding opportunities. You will find more information in the guidelines available on East Sussex County Council’s website.

Don’t hesitate to contact the organisations for more information and to go to special events about funding opportunities; it is also a good thing for funders to get to know your organisation and its project and get advice.

Did you know?

The [External Funding Team](#) at the East Sussex County Council can help you to identify funding opportunities for your project. You can also visit this free to use website: www.open4community.info/eastsussex to carry out funding searches.



EU programmes 2014-2020

Competitiveness for growth and jobs	
Connecting Europe Facility	Energy, transport and telecommunications
Competitiveness of Enterprises and SMEs (COSME)	Competitiveness and sustainability of the Union's enterprises, including in the tourism sector
Customs, Taxation and Fight against Fraud (CUSTOMS 2020, FISCALIS 2020, PERICLES 2020, HERCULE 2020)	Customs and taxation, Fight against fraud
Employment and Social innovation Programme	Employment, social
Erasmus+	Youth, education, sport
Horizon 2020	R&D, innovation, research
Economic, social and territorial cohesion	
Territorial cooperation (INTERREGs)	To help regions across Europe to work together to address shared problems
Competitiveness (more developed regions)	Corresponds to more developed regions, whose GDP is above 90 % of the EU average (ERDF+ESF)
Sustainable growth: Natural resources	
Common Agricultural Policy (pillar I)	Support to farmers
European Maritime and Fisheries Fund	Maritime and fisheries
Life programme	Environment
Rural Development (CAP pillar II)	Agriculture, environment, rural economy
Security and citizenship	
Asylum and Migration Fund	Migration, social inclusion, security
Consumer Programme	Placing the empowered consumer at the centre of the internal market
Creative Europe	Cultural and linguistic diversity
Europe for Citizens	Active European citizenship, bridging the gap between citizens and the EU
Food and feed	High level of health for humans, animals and plants all along the food chain, high level of protection and information to consumers
Health for Growth	To improve the health of EU citizens and reduce health inequalities across the EU
Internal Security Fund	Law enforcement cooperation, management of the union's external borders
Justice Programme	To ensure proper access to justice for people and businesses in cross-border legal cases in Europe and support EU actions to tackle drugs and crime
Rights, Equality and Citizenship	To make people's rights and freedoms effective in practice, promote the rights of the child, the principles of non discrimination and gender equality
Global Europe	
Development Cooperation Instrument	Combating poverty in developing countries
European Instrument for Democracy and Human Rights	Promotion of democracy and human rights in non-EU countries
Instrument for Stability (IfS)	To help prevent and respond to crises and create a safe and stable environment
Partnership Instrument (PI)	To advance and promote EU interests by supporting the external dimension of internal policies

Source: http://ec.europa.eu/budget/mff/programmes/index_en.cfm

Case study

Thanks to the brainstorming, ABC identified the following topics for their project: education, youth, future, culture, society, community, employment, economy. But the main topic remains “Literacy”.

ABC searched “literacy children” on www.open4community.info/eastsussex and identified three funds:

1/ Ernest Cook Trust	2/ Sainsbury Family Charitable Trusts	3/ JJ Charitable Trust Grant
“Grant for UK-based educational projects in the fields of the countryside and environment, environmental research and the arts, crafts and architecture”	“The Trusts support a wide range of interests, both in the UK and overseas, from: arts; disadvantaged children; homelessness; parenting and child welfare; social housing; social welfare; health welfare; medical research; urban regeneration/environment; environmental projects; education; Christian causes; to developing countries”	“The JJ Charitable Trust Grant is provided and administered by the Sainsbury Family Charitable Trusts and is available for voluntary and community organisations active in the UK”
Funded activities are: – Environmental awareness; – Arts, crafts and architecture; – Literacy and numeracy.	Funded activities: “new, innovative and unusual work which addresses new issues and can be successfully replicated or become self-sustaining”	Supports “charitable organisation undertaking projects involving the improvement of literacy and the environment, both in the UK and abroad”
Match funding: “Applicants are expected to show what other sources of funding have been sought and secured. The Trust always expects to be a part funder and does not commit funds for more than one year”	Match funding: “Applicants are expected to show what other sources of funding have been sought and secured”	As above.

Source: Open4community

The most relevant **national grants** would be “JJ Charitable Trust Grant” which is part of “Sainsbury Family Charitable Trusts”.

ABC could consider three potential **EU programmes**:

1/ CREATIVE EUROPE	2/ ERASMUS +	3/ RIGHTS, EQUALITY and CITIZENSHIP
Culture and artistic creation.	Youth, Education, Adult learning, Youth non-formal and informal learning, Sport.	Making people’s rights and freedoms effective in practice. Includes “rights of the child”. → Group 2. Programme not relevant enough, too wide.
→ “European Cooperation Projects”, Smaller scale cooperation projects.	→ Key Action 2, Strategic partnerships.	“Strengthening EU cooperation on justice and rights issues through networks of legal practitioners, non-governmental organisations and policy-makers”.
1 project leader + 2 partners in 3 different countries.	Minimum 2 organisations from 2 different Programme countries.	→ to be confirmed.
Eligibility: organisations active in the cultural and creative sectors.	Eligibility: organisations active in the field of education, training and youth or in socio-economic sectors.	“Access to the Programme shall be open to all bodies and entities legally established in: Member States, EFTA countries, etc.”
Maximum €200 000 = maximum 60% of the total eligible budget.	Maximum €150 000 per year (i.e. €12 500 per month).	→ To be confirmed.

To conclude, **ERASMUS + programme** would be the most relevant for ABC’s project.

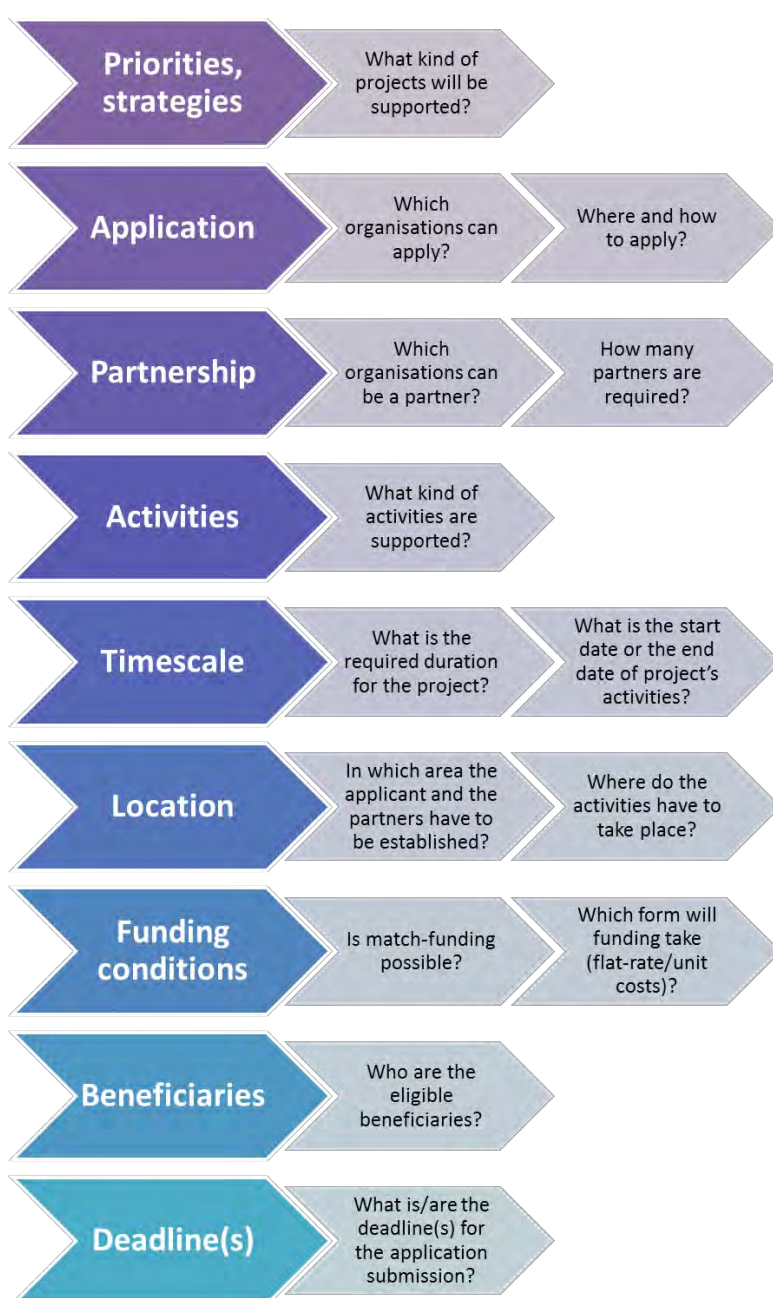
4

How to adapt the project to funder's requirements

Just one more push...

Firstly, you have to be aware that some funders don't allow match funding, i.e. the same activity cannot be funded by different grants. That is why your project could be split into different parts according to the beneficiaries, the activities, the field, the timescale, etc.

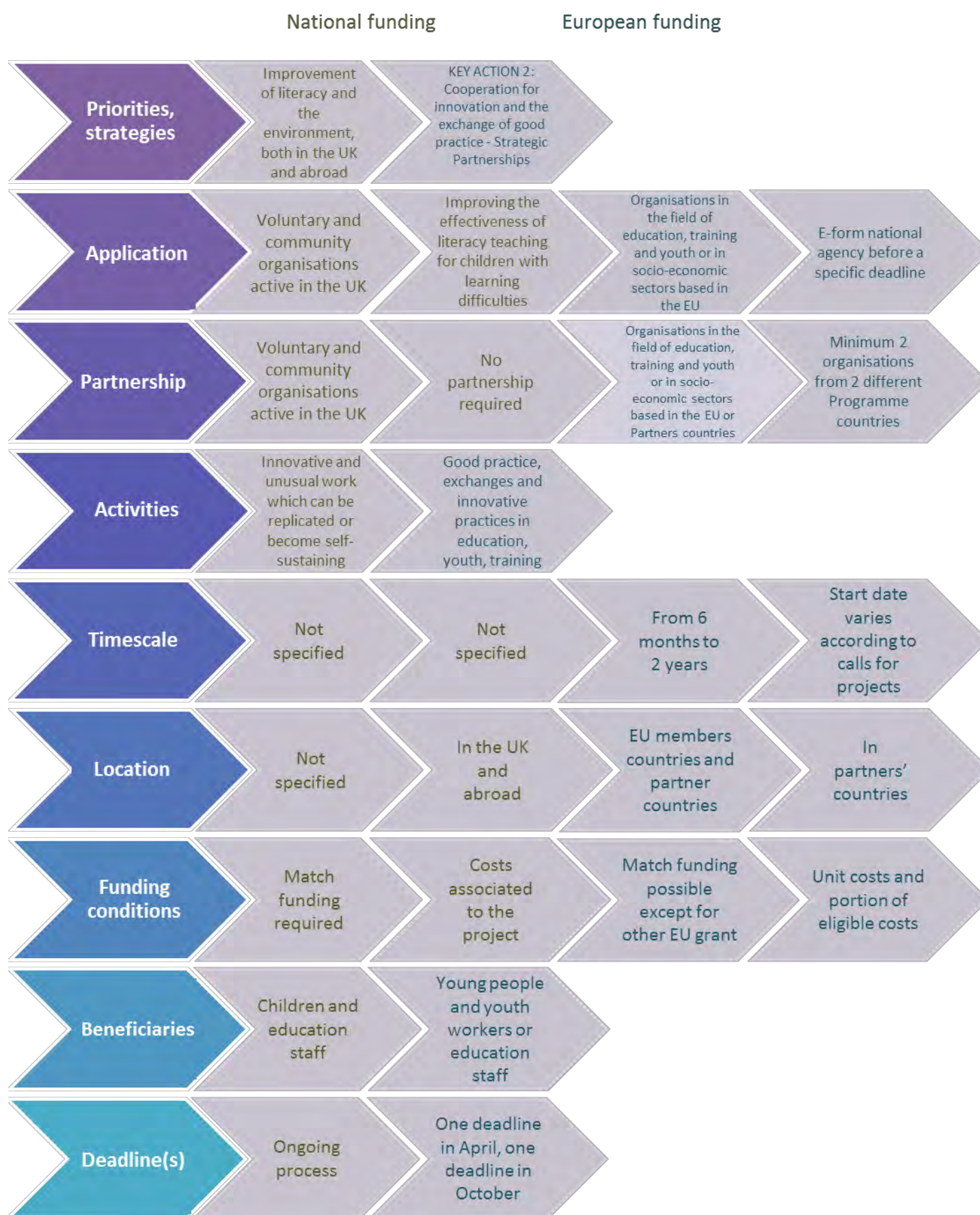
The more frequent eligibility criteria imposed by the funders are:



You need to check the criteria for each funding programme you plan on applying for. Finally, you have to look at them together.

At the end of this exercise, your project will take its final form, even if some changes remain possible during the application process.

Case study



5

Application process

No pain, no gain.

Well done! The development of your project has been achieved and you are now ready for the application process. As this part is a challenging one, it will be split into different sub-sections as follows:

- **Partnership:** how to build the most relevant and the strongest partnership for your project;
- **Tips:** general tips to help you efficiently manage the application process;
- **Dissemination and communication:** how to meet the dissemination requirements and how to prepare a communication plan;
- **Budget:** how to set up a realistic budget.



When the deadline is very close, some tips can help you at [page 81](#)

1/ Partnership

First of all, you have to comply with the partnership conditions required by the funder. These may concern the number of partners, their type of organisation, the eligible countries where they have to be established, and finally their status within the project implementation (project leader, partner, associated partner, etc.).

To identify your partners, you can use your own professional network or dedicated platforms on the internet and some funders provide a partner search facility. Your partnership will be stronger if you already know the partners and you have worked with them before. However, there is no obligation.

You should try to build a complementary partnership, which means each partner is active in a different field, has a different organisation type (business, school, not-for-profit organisation, etc.) or is established in a country other than yours. This will help you to reduce subcontracting during the project implementation and will increase the sharing of good practice.

2/ Tips

Firstly, please make sure that you have checked all the eligibility criteria for your project. It would be a shame to waste so much effort and time on an application if your project doesn't fulfil the conditions.

Then, you can try to share out the work with your colleagues for the drafting of the bid. You will save time and the whole team will be more productive, especially if each of you is working on their own favourite subject (i.e. the accountant works on the budget, the teacher on the education part, the communication manager on the communication plan, etc).

Regarding the application form, be sure to follow the guidelines and to answer the question. Don't write too long answers, use a simple vocabulary and avoid jargon. Your message has to be clear for everyone.

At the end, ask someone who doesn't know the project to read the application to be sure your project will be understood.

3/ Dissemination and communication

Dissemination is a strong point in your application, especially for European projects. But what does “dissemination” mean? Dissemination means promoting your project and communicating its outcomes to the public it’s aimed at. You have to ensure that the impact of your project will be known beyond the immediate project partnership. You can use local media, the local community and social media.

You might also be asked to submit a communication plan for your project. Firstly, you need to set some **communication objectives**. These have to be SMART:

- **Specific**;
- **Measurable**;
- **Appropriate**;
- **Realistic**;
- **Timed**.

Then, you have to identify your **target groups**, i.e. the audience for your message. These can be some organisations involved in the field you will work in, some officials who may influence the policy at a local or regional level (maybe even at a national and European level), and finally some organisations accompanying the beneficiaries of your project.

You have to define the **messages** to be delivered during the implementation of your project:

- How do you want to present your project?
- What would interest your audiences?
- How could you engage people in following your project?

You need to think about the **timescale** of your communication plan: how often do you want to communicate on your project’s progression and results? Which message for which step?

Regarding the **means of communication**, several possibilities exist: it could be a website, a newsletter, an event, a conference, etc. Try to reach a wider audience through local and social media.

Finally, depending on the means of communication you choose, you have to define the specific **budget** you need for communication.

4/ Budget

The budget must be reasonable and split into different categories (e.g. costs of activities, operating costs, staff costs, etc).

Do check the funding rules of each programme you are applying to as there might be some maximum grants or percentages which cannot be exceeded.

It is easier if the grant is paid out through unit costs because you can adapt your budget to these. If not, you can refer to similar activities you have already carried out.

Be sure you don't forget to include an activity, travel or a person working on the project. Maybe a mind map might help you with this.

Make sure to follow procurement rules when awarding contracts.

Since each programme sets out its own funding rules, read them carefully and it will help you with this task.

IMPORTANT:

Some programmes may allow in-kind contribution to the project (i.e. staff, building, services, equipment, etc.). It means that you won't necessarily need to bring only a financial contribution.

For example: The contributions to a project by one partner could represent 60% of financial contribution and 40% could be in-kind (20% staff + 20% material).

Note

You can choose to give a short project title that will help your project to stand out from others. For example, you can find an acronym that will include a description of your project:

→ Fostering Long-term Initiatives for Ports ([FLIP](#))

Or you can simply choose a short title that will give an idea of what your project is about:

→ [Waste in action](#); [Arch Expo](#); [Out of the blue - Woad, heritage and creativity](#)

General tips for bidding

1.	Before you start, <u>make sure your project meets every funder's criteria.</u>
2.	Download the official application form made available by the funder.
3.	Before you start to write, read the form carefully and identify the requested information . Understand the instructions and which information is expected by the funder. Write down the main different categories and sub-categories for every part of the form, this will help you to know afterwards which parts have been completed.
4.	Identify which supporting documents are requested by the funder. A partnership agreement will have to be signed between the project leader and each partner. Moreover, each partner will have to introduce themselves in the form. Send the information to the partners as soon as possible; ask them to sign the agreement and to fill in their dedicated part within the form. Set up a deadline for sending the documents to the lead partner at least one week before the official deadline for bids submission.
5.	A project summary might be requested in the form: you should start first with that part because it will help you to organise your ideas for selling your project to the funder.
6.	Regarding the other parts of the form, you should print a blank form and write down the main ideas, the arguments, the statistics , etc. that you will need to answer the question. You don't have to follow the order of the form, you can start with the parts that inspire you the most and go back to the others later.
7.	Once the form has been completed, ask a person who doesn't know your project to read the bid and to summarise the project to you. This will be helpful for you to be sure that your project will be understood by the funder as well. NOTE: Be careful on the quality of writing and avoid spelling and grammar mistakes. You should avoid jargon too.
8.	Put together the parts filled in by the partners and the supporting documents.
9.	Make sure you have met every funder's condition for the application form and add every requested document. You can now submit your bid by following funder's instructions.

Case study

ABC's project aims to improve children's skills in literacy through the pleasure of reading. The organisation wants to organise different activities in schools, first at a regional level and afterwards in the framework of a European partnership that will include the ABC organisation and one of their partner schools on one side and a French school and a French cultural organisation working with young people and based locally on the other side.

The target group of children will be between 7 and 8 as they are supposed to have the essential skills in reading. The different activities will be the organisation of workshops with children and parents/carers (or even grand-parents), visits to libraries, visits of professional storytellers at school and a link between the English school based in Hastings (East Sussex) and the French school based in Amiens (Picardy). The storytellers are members of the partner cultural organisations on each side.

Firstly, each school will work on their own during three or four months in order to explain the project and its main objective to the children. **This part will be funded by the English side through a national grant.** The French or the English partner will be gradually introduced to the children. The European part of the project will start in January and finish at the end of June. **This part will be funded by the ERASMUS+ European grant for both sides.**

The dissemination and communication activities will be ongoing during project implementation. The information about the project will be communicated through the social networks, a dedicated blog, a monthly newsletter and meetings with local key players and parents/carers organised every three months. Moreover, a bilingual book in English and in French will be published at the end of the project in order to leave a "souvenir" to the participants. A film from the beginning to the end of the project will present the activities carried out during project implementation to the public.

Finally, ABC chose a title for their project. As French partners will be involved during project implementation, they decided to find a title that would mix English and French. The project title will be:

D - liREading (Daily Reading)

"Délire" (here D - lire) means *frenzy* and "Lire" means *reading* in French. The D - liREading title creates a pun as "Daily Reading".

6

Project approval

It was worth it!

It has been a long time coming since your project submission... but you have just received the outcome letter from the selection panel: your project has been approved! Congratulations!

Enjoy the moment, inform your partners and be ready for the next step.

APPROVED

6 a

Project refusal

All is not lost

You have just learned that your project has been refused by the panel. You are disappointed and it is normal to feel that way. Don't worry, you still have the possibility to re-submit your project at the next call for projects.

First, the panel may give you a **scoreboard** which has been used to assess your project. Read it carefully, it will help you a lot.

There are two kinds of reasons why you have failed:

- On one hand, reasons for which there is nothing you can do:
 - Your project doesn't meet the **funder's criteria**: your organisation or your partners are not eligible (type of organisations, place of the head office, etc.);
 - Your project doesn't meet the **funder's priorities**: Example: the funder's priority is to help the elderly people but your project aims to help young people;
- On the other hand, reasons for which there is something you can do:
 - An **administrative reason**: you forgot to send an important document requested by the funder (partner's mandate, proof of legal status, declaration of honour, etc.);
 - Your **bid** wasn't detailed enough: Did you answer the questions correctly? Did you follow the instructions? Has your project been well prepared? ([See 2. From the idea... to the project](#));
 - The **budget** wasn't well balanced and realistic enough: if you spend too much in sub-contracting, your bid will lose points. Your budget must be proportionate to the scale of your project. Your bid could fail because of a too tight or too large budget ([See 5. Application process](#)).

Finally, check the **next deadline** for the co-funding programme you are interested in so that you can prepare to re-submit your bid.

To conclude, you have to look into your mistakes that led to your bid being refused to allow you to bounce back.

Note

Unless you have a very strong case, appeals against a refusal - where the process is available - have a high probability to be a waste of time and energy. Always be sure that your bid had met all the criteria before appealing. It is more difficult to fight against eligibility criteria, but the project quality analysis is of course objective.

PROJECT MANAGEMENT

7

Administrative preparation

Get your pens ready!

Once your project has been approved, different documents have to be prepared before the payment of the grant.

Conditions may vary from a co-funding programme to another one, so please check your grant offer letter.

1/ The Partnership Agreement

This document is an agreement between the partners taking part in the project. Each partner signs an agreement with the lead partner. The document should include:

- The name of the partner and the name of the lead partner;
- The name of the project;
- The start date, the duration and the estimated end date of the project;
- The sum that the partner will pay during the project's implementation and their in-kind contributions;
- The definition of the financial and legal responsibilities of the partner;
- The conditions to follow should the partnership be modified (new partner, partner's resignation);
- Decision making processes within the partnership;
- The definition of the partner role during the project implementation, and beyond;
- The procedure for the mediation and arbitration of disputes within the partnership.

2/ The Work Plan

You may have been asked to provide this document with your bid to outline the planning for the implementation of your project and the sharing of tasks between the partners.

TIMESCALE	January (or month of your project start date)	F	M	A	M	J	J	A	S	O	N	D	Etc.
Work Package 1	Partner A												
Work Package 2				Partner B									
WP3					Partner C								
WP4	Partner A												
		Partner B											
WP5	Partner A						Partner C						
			Partner B							Partner B			
Etc.													

3/ The Grant Agreement

This agreement involves the funder and the lead partner (or each partner). The funder sets out conditions that the beneficiaries will have to follow.

The most frequent elements are:

- The start date, the duration and the estimated end date of the project;
- Actions to be implemented during the project;
- Details of the grant: amount, form, reimbursement rate, payments, etc.;
- Eligible and ineligible costs;
- Other conditions: Procurement, publicity, reporting, audits, evaluation, intellectual property, dissemination of the results, etc.;
- Force majeure conditions.

The funder may provide a model for this document.

The lead partner and its partners will have to agree on the system they choose for the grant payment. They may decide that the lead partner will receive the grant from the funder and then distribute the share to the other partners according to their participation in the project. Or they can decide that the funder will pay the grant directly to each partner. In any case, this will have to be defined in the Grant Agreement.

8

Project preparation and launch

Ready, steady, go!

Once the different agreements have been signed, you can proceed to the project preparation before its launch. Different steps should be carried out in order to successfully complete this phase:

- First partnership meeting;
- Start of the dissemination process;
- Start of the evaluation process.

1/ First partnership meeting (Kick-off meeting)

The kick-off meeting is the foundation stone of your project. It will be the first time that all the partners will meet to discuss the project implementation. For an efficient organisation of this meeting, please [see 9.c Meetings and events](#).

It would be a good point to use this first meeting to check that everyone has understood the partnership's commitments to the funder (i.e. reporting, publicity, supporting documents, etc.).

2/ Start of the dissemination process

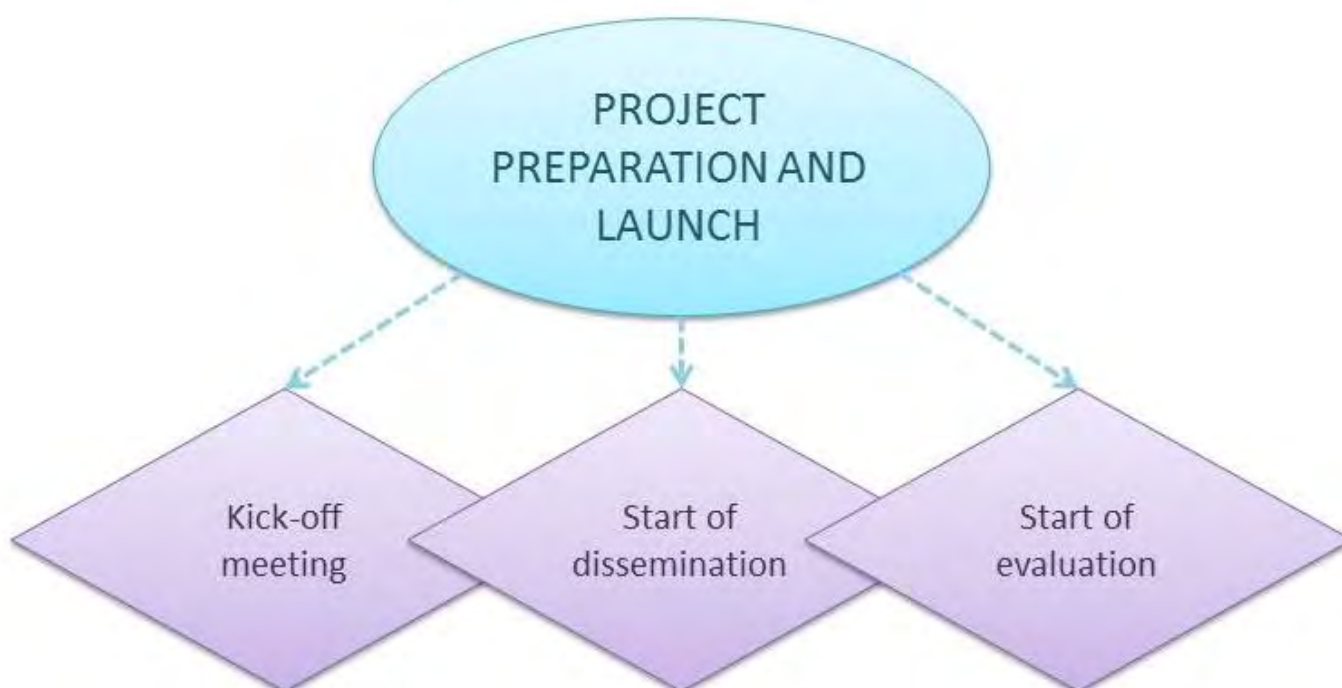
Dissemination is a key activity during the project implementation. For more information on dissemination, please [see 9.g Dissemination](#).

For the project launch, you could organise a public event for communicating on your project, its objectives and the beneficiaries' expectations. Try to involve the local community, i.e. local authorities and key players, beneficiaries, etc. Don't forget to communicate on the event through social networks and local media.

3/ Start of the evaluation process

Evaluation is a very important activity. Before the project activities start, you must have a baseline. To find out how to carry out an efficient evaluation, please [see 9.d Evaluation](#).

You may have already started this process during the project development phase, especially with the exercise of state of the art analysis and the gathering of statistics. However, it is equally important to collect the expectations of the beneficiaries through interviews or questionnaires.



9

Project implementation

Lights, camera, action

Everything is ready and your project has finally started. All you need to do now is to put your knowledge and know-how into action. If you had to remember only one thing about project implementation, it would be the fact that you and your partners have to fulfil their commitments, especially your project objectives that you defined during the development phase.

But unfortunately, project implementation is not that simple. Many cross-cutting activities have to be taken into account during the implementation of your project. These are the three most important ones:

- Project monitoring;
- Evaluation;
- Dissemination.

The others are:

- Reporting rules;
- Publicity rules;
- Lead partner;
- Meetings and events;
- Financial management;
- Audit;
- Issues.

All these activities remain unavoidable for project implementation, especially for EU projects.



9 a

Project monitoring: Gantt chart

The Gantt chart is an essential project management tool. Understanding how it works and being able to create one will help you a lot.

A Gantt chart is a project management tool which helps monitor a project. It is very useful if you want to know how your project is progressing and this will enable you to anticipate issues that the implementation of your project could face.

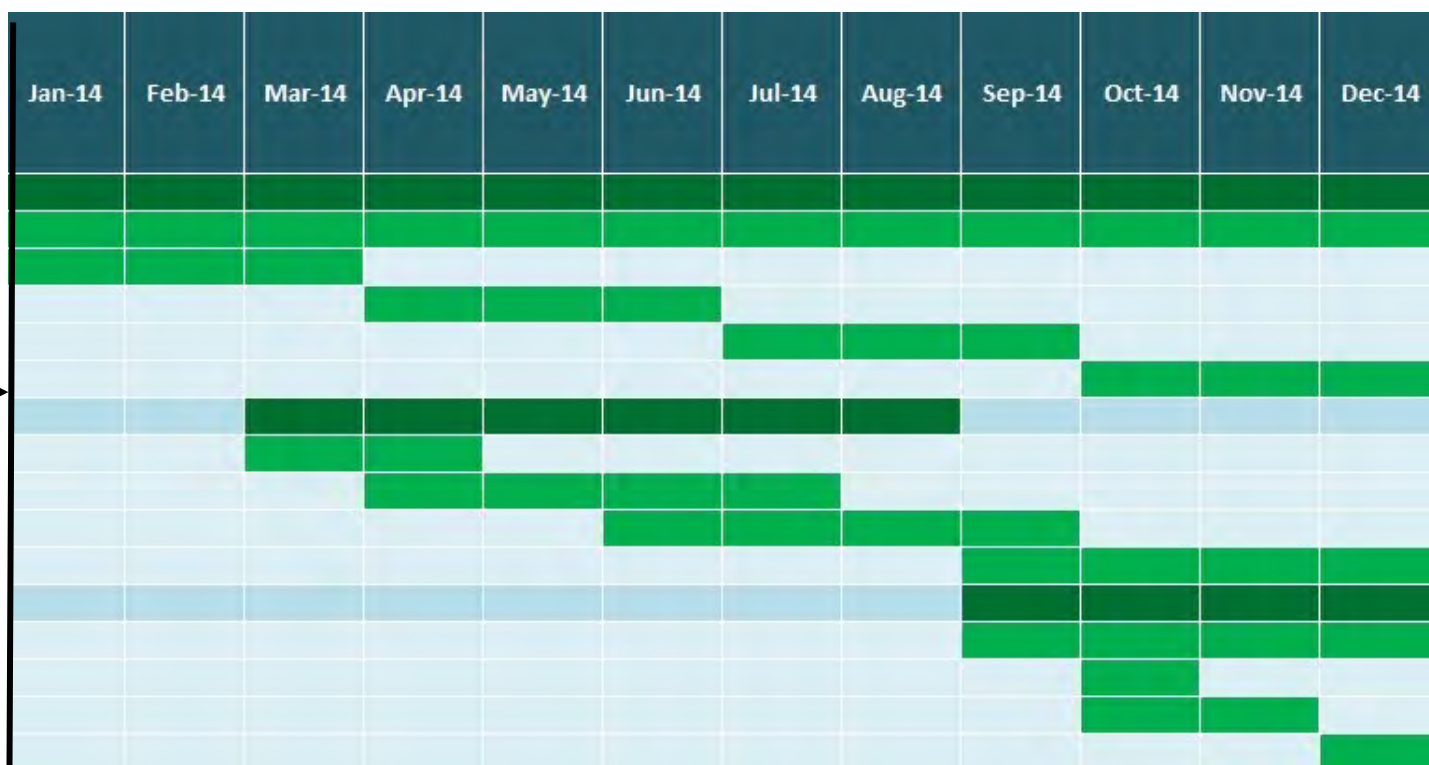
You can create a Gantt chart with a spreadsheet software (such as Microsoft Excel), but some project management software can assist you in this step ([See Annex A. Project management software](#)).

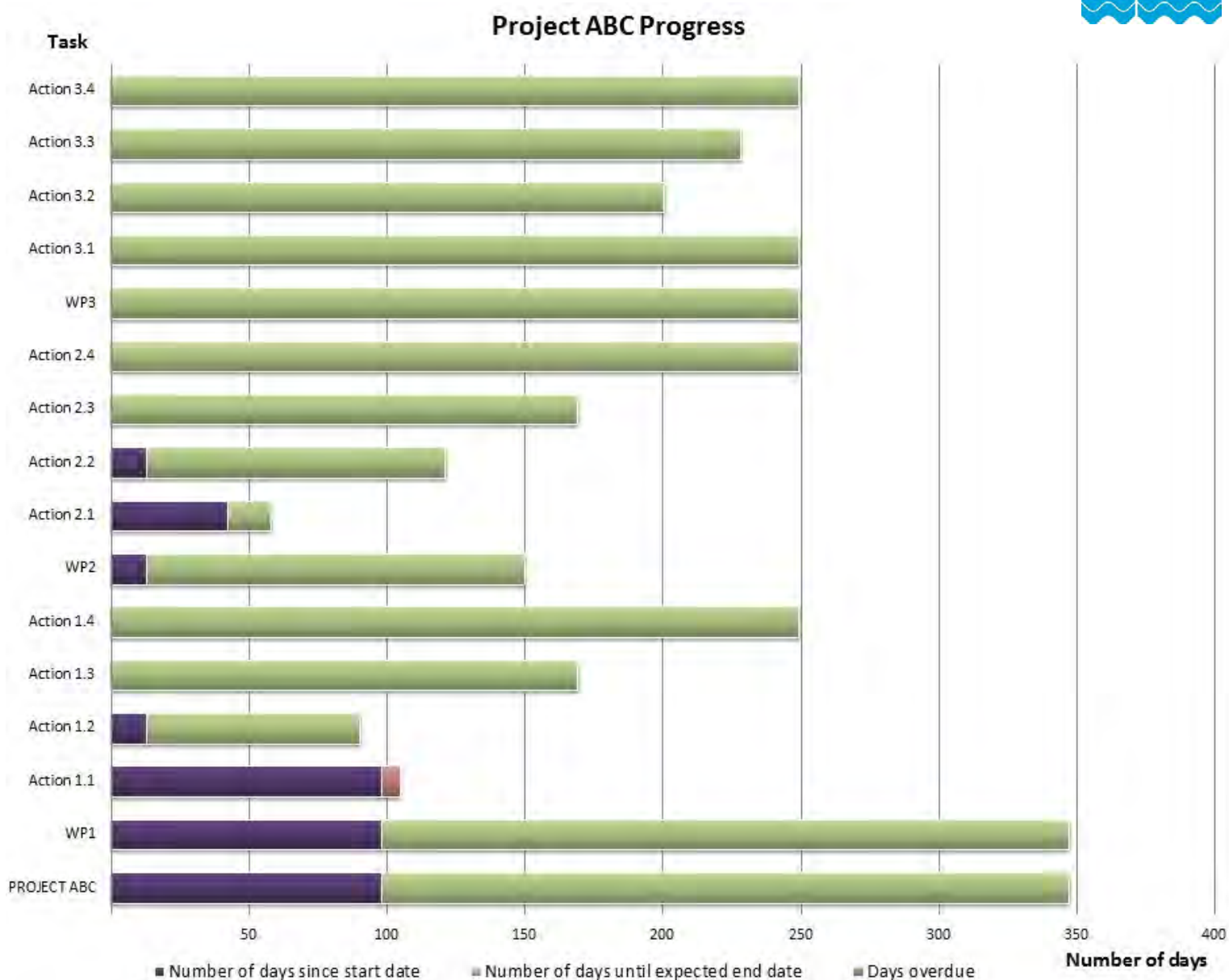
On the following pages you will find a Gantt chart template. You can adapt it according to your needs.

A Gantt chart should include three different parts. The first one (the red table) presents a list of every work package and every action of your project. You need to enter the start date of each task, its expected duration, and its effective end date. You can add further information like the expected end date, or the number of days since the start date and until the expected end date. And if you are a confident Excel user, you can add the person(s) or the partner(s) in charge of each task and then generate a chart for each of them to monitor their progress.

The second part of the Gantt chart (the blue table) is linked to the Work Plan in Part [7. Administrative Preparation](#). Again, you can adapt the template to your needs. In this table, there is a column for each month of the project implementation. A green cell means the work package or the action will be implemented at that point. This part is optional, it is not required for the creation of the Gantt chart. However, it is useful when different activities overlap or where you can't start if one specific activity is not completed.

Task name	Start date	Expected duration (in days)	Expected end date	Number of days since start date	Number of days until expected end date	Days overdue	Effective end date
PROJECT ABC	06/01/2014	347	19/12/2014	95	252		
1 WP1	06/01/2014	347	19/12/2014	95	252		
2 Action 1.1	06/01/2014	84	31/03/2014	95		7	07/04/2014
3 Action 1.2	01/04/2014	90	30/06/2014	10	80		
4 Action 1.3	01/07/2014	91	30/09/2014		172		
5 Action 1.4	01/10/2014	79	19/12/2014		252		
6 WP2	01/04/2014	150	29/08/2014	10	140		
7 Action 2.1	03/03/2014	58	30/04/2014	39	19		
8 Action 2.2	01/04/2014	121	31/07/2014	10	111		
9 Action 2.3	02/06/2014	120	30/09/2014		172		
10 Action 2.4	01/10/2014	79	19/12/2014		252		
11 WP3	01/09/2014	109	19/12/2014		252		
12 Action 3.1	01/09/2014	109	19/12/2014		252		
13 Action 3.2	01/10/2014	30	31/10/2014		203		
14 Action 3.3	01/10/2014	58	28/11/2014		231		
15 Action 3.4	01/12/2014	18	19/12/2014		252		





The last part is a chart including the information you added earlier. On the x-axis, you have the duration in number of days. On the y-axis, you have the list of the tasks. The green bars represent the expected total duration of the task. The purple parts represent what has been achieved so far and the red part represents the delay in project implementation.

Case study

Here is the Gantt chart for the ABC's project (national and European parts) [on 15/03/2015](#):

Task name	Start date	Expected duration (in days)	Expected end date	Number of days since start date	Number of days until expected end date	Days overdue	Effective end date
D - liREading project	15/09/2014	288	30/06/2015	181	107		30/06/2015
1 WP1 ACTIVITIES IN THE UK ONLY	15/09/2014	95	19/12/2014	181	-	-	17/12/2014
2 Action 1.a Workshops with children and parents (or grand-parents)	01/10/2014	61	01/12/2014	165	-	7	08/12/2014
3 Action 1.b Visits to libraries	15/09/2014	95	19/12/2014	181	-	-	17/12/2014
4 Action 1.c Visits of professional storytellers at school	22/09/2014	88	19/12/2014	174	-	-	17/12/2014
6 WP2 ACTIVITIES ON BOTH SIDES	05/01/2015	176	30/06/2015	69	107		
7 Action 2.a Correspondence between English and French children	05/01/2014	541	30/06/2015	434	107		
8 Action 2.b Visit of English children and teachers in France (5 days)	22/03/2015	5	27/03/2015	-	-		
9 Action 2.c Visit of French children and teachers in the UK (5 days)	17/05/2015	5	22/05/2015	-	-		
10 Action 2.d Workshops with children and parents (or grand-parents)	12/01/2015	137	29/05/2015	62	75		
11 Action 2.e Visits to libraries	26/01/2015	155	30/06/2015	48	107		
12 Action 2.f Visits of professional storytellers at school	19/01/2015	154	22/06/2015	55	99		
13 WP3 DISSEMINATION AND COMMUNICATION	15/09/2014	288	30/06/2015	181	107		
14 Action 3.a Social networks, blog	15/09/2014	288	30/06/2015	181	107		
15 Action 3.b Monthly newsletter	01/10/2014	272	30/06/2015	165	107		
16 Action 3.c Meetings with parents and local key players	01/10/2014	272	30/06/2015	165	107		
17 Action 3.d Creation of a bilingual book	05/01/2015	176	30/06/2015	69	107		
18 Action 3.e Film report	15/09/2014	288	30/06/2015	181	107		

9 b

Lead partner principle

The lead partner is the link between the European Commission or the managing authorities and the project. They have several responsibilities.

The role of the lead partner

- The lead partner is the coordinator of the project. They are the key contact with the European Commission or the managing authority of the co-funding programme. They oversee the running of the project and have to centralise and disseminate information between the partners. They organise meetings or video conferences between the partners and they must also deal with issues that might arise within the partnership.
- The lead partner is responsible for the implementation of the project. They have to monitor whether the objectives have been achieved on time.
- The lead partner is administratively responsible for the project. They have to obtain the required information from the partners in order to prepare and send the progress and final reports.
- The lead partner is financially responsible for the project. They oversee the expenditure and collect the supporting document before sending payment claims to the Commission or the managing authority. They may also receive the payments and be responsible for forwarding payment to the project partners.





Note

Managing a partnership is not an easy task. There are some tips you need to know:

- **Communication and information:** It is important for the partners to communicate on project implementation. Frequent meetings will be useful.
- **Organisation:** Together try to put in place a system that will work for you for gathering financial support documents and data for evaluation.
- **Monitoring:** It is important to monitor the implementation of activities and the budget in order to prevent potential issues that you and your partners could face.
- **Diplomacy:** The lead partner coordinates but does not make decisions on its own. Always encourage listening to and respecting the partners, even in tense situations. Compromise and consensus are required (and maybe self-control too...).

9 c

Meetings and events

It is important to organise transnational meetings between the partners in order to strengthen the partnership and circulate information.

Recommendations

There are three steps for transnational meetings:

- **The first partnership meeting** (or kick-off meeting): it is usually organised in the country of the lead partner. It should happen after the official start date of the project so that the expenditure is eligible. The first meeting allows partners to agree the deadlines for reports and payments claims and an evaluation strategy, and to present the contractual arrangements.
- **Interim meetings**: these can be organised in the country of one of the partners. There should be two or three interim meetings a year during the life of the project, it depends on the length.
- **The final meeting**: this can be organised in a special location for the project, for example in Brussels or to coincide with a relevant conference. This meeting is organised to discuss the closure of the project (supporting documents, reports, financial reports), to enhance and disseminate the results of the project and to discuss follow-up to the project.

The subsistence costs may be covered by the host partner. Each European programme has its own rules concerning the costs for the organisation of a transnational meeting.

When a meeting is organised in the country of one of the partners, the lead partner may set or approve the agenda. The lead partner will usually chart the meeting.

A common working language for the project should be chosen. It has to be understandable by each partner, and fluent speakers have to adapt to others. Written supporting documents can be distributed. In some cases interpretation will be appropriate as well as key documents.



How to organise a meeting / event

Here is a checklist which may help you in the organisation of a meeting or an event:

AGENDA	
<ul style="list-style-type: none"> • Implementation of the project 	
<ul style="list-style-type: none"> • Follow-up 	
<ul style="list-style-type: none"> • Management 	
TIMEFRAME	
LOCATION	
PARTICIPANTS	
HOTELS/BOOKING	
TRANSPORTATION (to/from, parking?)	
CATERING	
MINUTE TAKER	

9 d

Evaluation

The evaluation is a key element of your project. It is useful to decide the continuation, the termination and/or adjustments to the project.

Recommendations

Evaluations are useful for reporting the success of the project, building on experience and improving the management of the project. Evaluation results are the basis for decision making regarding the current project or future projects.

Partners have to define the criteria by which the project will be assessed. Those may relate to efficiency, impact, pertinence, reach, innovation, etc.

One or more of the following evaluation methods may be used:

- **External evaluator:** a person from outside the partnership will assess the project. You have to pay for this method.
- **Internal evaluator:** One of the partners will assess the project.
- **Assisted auto-evaluation:** The partnership will be assessed by an evaluator or an evaluation agency. You have to pay for this method.
- **Cross-evaluation:** Where you have two similar projects, a person from one project will evaluate the other one.

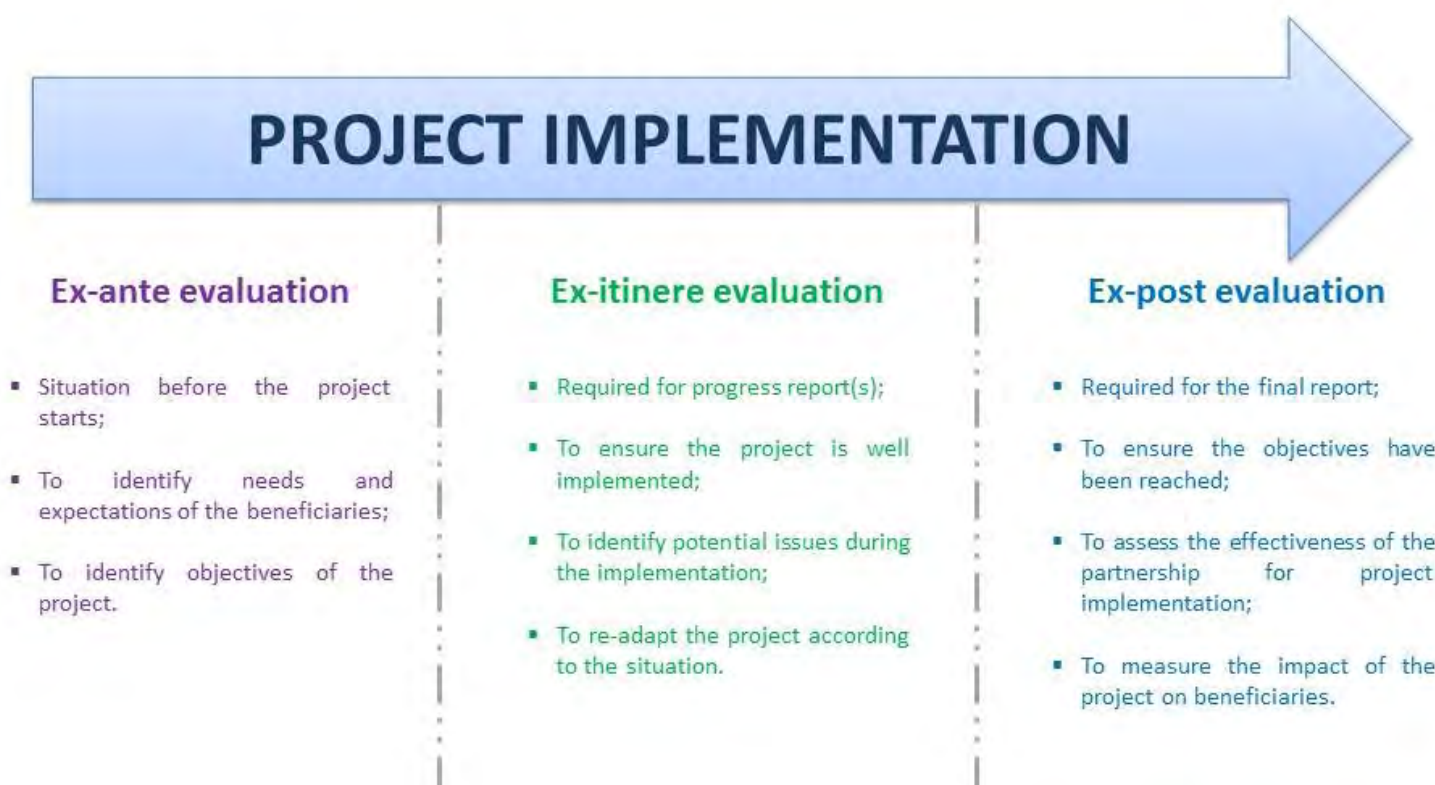
All partners must agree on the evaluation plan and be kept informed. Evaluations are built in the timetable and the budget of the project.

In order to provide comparable data for evaluations, a baseline study should be carried at the beginning of each project (ex-ante evaluation). There are different stages for evaluation:

- **Ex-ante:** before or at the very beginning of the project. Examine the situation before the project is implemented.
- **Ex-itinere:** during the project. Assess the implementation of the project according to milestones (for example every three months or at the end of implementation of a work package or activity).
- **Ex-post:** At the end of the project. Evaluate the impact of the project compared to the ex-ante and ex-itinere evaluations ([See 12. Project impact](#)).

The information gathering could take the form of surveys, interviews, etc. You have to describe the evaluation process and the results in the different progress reports and the final report.

IMPORTANT: beneficiaries' expectations and what they feel are as important as statistics.



Case study

For the ex-ante evaluation, the children will be brought together and they will answer simple questions in order to identify their idea about the pleasure of reading. The statistics used for the bidding process can also be used for an estimation of the situation before the project starts.

For the ex-itinere evaluation, the young participants will answer the same questions as the beginning: how often they go to the library, the interest of the children for reading and their results at school can also be taken into account.

For the ex-post evaluation, the children will be asked to share their view on the pleasure of reading and their interest for the books. The progress of their results at school can be a proof of the project impact.

The film report will represent an ongoing evaluation method during the project implementation. It allows to keep track of the project progress.

9 e

Publicity rules

Publicising who the funder is, is mandatory. For European co-funding programmes, it is a contractual obligation. If it is not adhered to, the European Commission or the managing authorities may demand partial or complete repayment.

Publicity responsibilities

All publications, any other dissemination activity and all promotion materials produced within the framework of the project (e.g. articles, reports, seminars and workshop programmes, PowerPoint presentation, attendance lists, promotional items, websites, etc.) must always make clear reference to the funder (i.e. the EU, the fund and/or the programme co-funding the project).

1/ The European flag

You have to use the European flag every time, whatever the European programme is.

2/ The programme logo

You have to use the logo of the European programme which co-finances your project. Each logo is available on the programme's website.

3/ The reference to the fund (if necessary)

You have to make a reference to the fund from which your project is funded For the ERDF, it is "European Regional Development Fund / The European Union investing in your future" or "This project is co-financed by ERDF and made possible by the INTERREG IVC Programme", etc.



Note

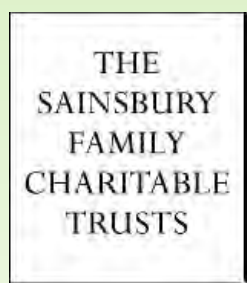
The funder may provide a communication toolkit (for example stickers, posters, visual identity manual, etc.).

Case study

ABC's project will be co-funded by the national grant "JJ Charitable Trust" which is part of the Sainsbury Family Charitable Trusts, for the beginning of the project. For the partnership with the French school and organisations, the activities will be co-funded by the ERASMUS+ European programme.

For each activity during project implementation, the reference to the funders must be clear. For instance, the logo of each funder must appear on the blog, the monthly newsletter, every communication document and on the bilingual book which will be given to the participants at the end of the project.

The reference to the funders should be presented as follows:



This project is co-funded by the JJ Charitable Trust
which is part of the Sainsbury Family Charitable Trusts



This project is co-funded by the European Union
through the ERASMUS+ programme

9 f

Reporting rules

Reporting is a contractual requirement of European projects. It serves the purpose of communicating project progress as well as triggering grant payments.

Tips

Each European programme has its own reporting requirements. Check your grant and partnership agreements to identify the specific requirements for your project.

1/ Progress report

In the application form, you had to outline the different objectives of your project and their outputs. For the progress report, you have to include this information and to update it in order to illustrate the progress of your project since it started.

Moreover, you have to prepare a financial report for your project's expenditures. Don't forget to keep and provide any supporting document as requested by the managing authority.

You will have to respect different deadlines to send your reports. Each European programme has its own rules, please refer to the guidelines for more details.

2/ Final report

At the end of your project, you will have to submit a final report. You have to summarise the project's main achievements. The final report should show the impact of your project since it was implemented, and what you have learnt from your experience. You also have to submit the last financial report up to the closure of the project. **You have to send this last report to obtain the last payment of the grant.** Each European programme has its own deadlines, you have to adhere to them.



Checklist for reporting

Here is a checklist which may help you manage the reporting process:

REPORTING PLAN	
DEADLINES	
KEY STAGES	
KEY PEOPLE	
AUTOMATIC REMINDERS (Outlook)	
USE PROJECT MEETINGS TO UPDATE ON PROGRESS	
TIMEFRAME TO COLLECT PARTNER INFORMATION	
SYSTEMS/FORMATS	

9 g

Dissemination

Dissemination is a key element of your project, which is required by the European Commission for EU projects. It ensures the impact of your project is spread beyond the immediate project partnership.

Tips

For an efficient dissemination of your project, you will need to refer to your communication plan ([See 5. Application process; 3/ Dissemination and communication](#)).

The dissemination may take different forms:

- You can organise **special events, conferences or seminars** to communicate on your project and its progress. Bear in mind that you have to involve relevant local key players (i.e. businesses, not-for-profit organisations, local authorities, higher education institutions, etc.) for a wider dissemination;
- The **internet** will be your best friend for dissemination. You can create a multilingual website or blog for your project, and do not hesitate to use social networks!
- You can prepare a multilingual **newsletter** that you could send monthly either in electronic or printed format to the local key players of each partner;
- You can create some **promotional items** (i.e. T-shirts, pens, flyers, posters, etc.) with the logo of your project;
- Your project may include some **products** (i.e. software, DVD, book, exhibition, etc.). In the case of a commercialisation of these, the conditions have to be specified in the partnership and the Grant Agreement.

Notes

- Just like with the title of your project, you can create a logo which will strengthen the its identity. Again, be creative but try to be simple. You can either create the logo yourself or appoint professionals (this may be eligible under communication costs);
- Do not forget to make a clear reference to the funder(s) of your project during the dissemination ([See 9.e Publicity rules](#)).

Case study

The partnership designed the following logo:



That logo will be used on project's blog and during every communication activity in order to strengthen project's identity. Some caps or tee-shirts with project's logo will be worn by the participants during the visits to the English or French school.

During meetings or conferences, the project logo will be printed on the supporting documents and the programmes. The logo will be on the top of the monthly newsletter and on the cover of the bilingual book.

9 h


Financial management

Financial management is a crucial point for project management. Setting up a successful organisation right from the beginning of project implementation will help you with this task.

There is no secret: if you want to stay on top of your project budget you need to be well organised. First of all, every partner involved in the project must keep its own account up-to-date. Then, the partnership must put in place a system for sending all the requested supporting documents to the lead partner in order to send the payment claims to the funder ([See 9.i How to plan for audit](#)).

Example: Partners will send the documents at the end of each month of project implementation otherwise they won't get their part of the grant.

Always check the funder's conditions to be sure that your expenses are eligible for funding. The funder might write a guide for that purpose.

Some expenses (See ) as staff costs, subcontracting, overheads and depreciation are subject to a specific method of calculation. The funder may provide templates or ask you to use their own: please see your grant agreement and any supporting guide provided.

On the following pages you will find some advice for calculating these specific budget lines.

Notes

- You MUST spend the whole grant, which means you cannot save money on the grant in the hope to keep the difference at the end of project implementation;
- Conversely, you cannot be over budget. The funder may allow a margin of error on the project budget ([See 10. Potential issues](#));
- Where possible, always work with the Financial Services or a Finance officer within your organisation;
- Bear in mind that the funder has set up some eligible and non-eligible expenses;
- Always keep ORIGINAL proof of payment and the invoice for every expense made;
- Your organisation must be able to advance money as there could be some cash flow issues;
- European grants are assessed and dealt with in Euro. A rate may have been given to you or if not [See ANNEX B: European projects Special: How to manage the conversion between the Pound and the Euro](#)).

Template for financial management

Here is a template for monitoring your project budget. Budget lines might vary according to the funder.

Add as many columns as you need according to project length.

Add as many rows as you need according to partners number.

	Month 1		Month 2		Month 3		Month 4		Sub-total	
	£	€	£	€	£	€	£	€	£	€
INCOME										
LEAD PARTNER										
Funder A									£0.00	€0.00
Funder B									£0.00	€0.00
Funder C									£0.00	€0.00
Own-resources									£0.00	€0.00
In-kind contribution (capital)									£0.00	€0.00
In-kind contribution (revenue)									£0.00	€0.00
Donations									£0.00	€0.00
Direct income generated by the project									£0.00	€0.00
Sub-total A.1	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00
PARTNER A										
Funder A									£0.00	€0.00
Funder B									£0.00	€0.00
Funder C									£0.00	€0.00
Own-resources									£0.00	€0.00
In-kind contribution (capital)									£0.00	€0.00
In-kind contribution (revenue)									£0.00	€0.00
Donations									£0.00	€0.00
Direct income generated by the project									£0.00	€0.00
Sub-total A.2	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00
Sub-total A (A.1 + A.2)	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00
EXPENDITURES										
LEAD PARTNER										
CAPITAL										
A/ Infrastructure, building, refurbishment									£0.00	€0.00
B/ Capital items									£0.00	€0.00
REVENUE										
C/ Staff ★									£0.00	€0.00
D/ Financial audit costs (where applicable)									£0.00	€0.00
E/ Travel and subsistence									£0.00	€0.00
F/ Translation, interpretation and documents									£0.00	€0.00
G/ Communication and dissemination									£0.00	€0.00
H/ Subcontracting ★									£0.00	€0.00
I/ Overheads ★									£0.00	€0.00
J/ Depreciation ★									£0.00	€0.00
K/ Consumables									£0.00	€0.00
Sub-total B.1	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00
PARTNER A										
CAPITAL										
A/ Infrastructure, building, refurbishment									£0.00	€0.00
B/ Capital items									£0.00	€0.00
REVENUE										
C/ Staff									£0.00	€0.00
D/ Financial audit costs (where applicable)									£0.00	€0.00
E/ Travel and subsistence									£0.00	€0.00
F/ Translation, interpretation and documents									£0.00	€0.00
G/ Communication and dissemination									£0.00	€0.00
H/ Subcontracting									£0.00	€0.00
I/ Overheads									£0.00	€0.00
J/ Depreciation									£0.00	€0.00
K/ Consumables									£0.00	€0.00
Sub-total B.2	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00
Sub-total B (B.1 + B.2)	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00
Net cash balance (Sub-total A - Sub-total B)	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00	£0.00	€0.00

1/ Staff costs calculation

Staff costs should be calculated on a monthly pro rata basis, unless staff is employed full time on the project, in which case payslip will be sufficient.

1. Staff involved in the project must fill in a monthly time sheet during project implementation period;
2. You need to know the monthly **staff cost** of each member involved for the organisation (gross salary + national insurance + pensions);
3. You need to know how many **days have been worked in total** during the month by each member of staff involved in the project;
4. You need to know how many **working days have been dedicated** to the project by each staff member involved;
5. You are now able to calculate the monthly rate of staff costs for each member of staff involved:

$$\text{Staff costs} \times \frac{\text{Project worked days}}{\text{Total worked days}} = \text{Monthly staff costs for the project}$$

Voluntary work is an in-kind contribution. You will have to refer to a salary similar to the position to evaluate its value.

Example:

John Smith is in charge of the EU project XYZ.

- The organisation 1234 spends **£1,600** for his position every month;
- John worked **18 days** in June;
- John spent **12 days** in June on the EU project.

$$\text{£1,600} \times \frac{12}{18} = \text{£1,066.67}$$

Notes

- Repeat the calculation for each member of staff involved;
- The funder may apply a flat rate regarding staff costs, or
- The funder may provide their own method of calculation.

2/ Overheads costs calculation

Overheads costs are eligible under specific conditions as defined by the funder. In any case, overheads costs must be directly linked to the project. These costs can be for heating, lighting, rent, communication, etc.

You need to calculate real costs incurred for the project.

You need to identify the rate of working days dedicated on the project by the members of staff involved.

JUNE		
Staff involved	Days dedicated to the project	Days worked in total
John	12	18
Peter	3	5
Mary	20	20
Elizabeth	1	12
TOTAL	36	55

The organisation 1234 spends:

- £350/month for electricity;
- £1,500/month for rent;
- £225/month for communication (internet, telephone, mail).

The total for overheads is **£2,075**. The method of calculation for overheads linked to the project is:

$$\begin{array}{rcccl}
 & & 36 & & \\
 & & \text{---} & & \\
 \text{£2,075} & \times & & = & \boxed{\text{£1,358.19}} \\
 & & 55 & &
 \end{array}$$

Notes

- Keep every supporting ORIGINAL documents for every expenditure made (invoice or receipts);
- The financial services within your organisation might already have calculated a rate for overheads;
- The funder may apply a flat rate regarding overheads costs, or
- The funder may provide their own method of calculation.

3/ Depreciation costs calculation

Here, depreciation means the loss of value of a good purchased as part of the project over time. Depreciation is not a “traditional” expenditure but it has to be taken into account in your project budget.

In order to calculate the depreciation of a good, you will need the following information:

- Whole project duration in months;
 - Date of purchase of the good;
 - Purchasing cost of the good;
 - Usage rate of the good.
1. You need to calculate the number of months in one year only when you are using the good divided by the total duration of your project in months;
 2. Multiply that result by the purchasing cost of the good (price with all taxes included for not-for-profit organisations, price without taxes for businesses);
 3. Multiply the result by the usage rate of the good.

Example:

The duration of the project XYZ is 24 months from 1st March 2013 to 28th February 2015. The not-for-profit organisation 1234 bought a computer on 1st September 2013 and spent £900 (all taxes included). The usage rate of the computer dedicated to the project is 60%.

2013	2014	2015
$(4/24) \times 900 \times 60\% = \text{£}90$	$(12/24) \times 900 \times 60\% = \text{£}270$	$(2/24) \times 900 \times 60\% = \text{£}45$
$90/4 = \text{£}22.5$ per month (from September)	$270/12 = \text{£}22.5$ per month	$45/2 = \text{£}22.5$ per month (to February)

4/ Subcontracting conditions

Subcontracting, or procurement, might be necessary during project implementation. The procurement of some of your project's activities must be balanced and should represent a small part of the total activities of your project. That is why it is necessary to include complementary partners within project's partnership in order to limit the use of subcontractors ([See 5. Application process 1/ Partnership](#)).

The funder, the State and your organisation might apply specific rules for subcontracting according to the amount of the procurement. You will find below some examples:

Thresholds of procurement	Rule
Below £5,000	Free to choose
From £5,000 to £20,000	3 quotes have to be submitted
Above £20,000	Public tender

In case of tender, the quotes have to be kept as supporting documents for an eventual audit by the funder ([See 9.i How to plan for audit](#)).

9 i

How to plan for audit

The European Commission can decide to audit a project* during its implementation and up to five or ten years after the project closure (according to the EU programme). The audit aims to check that the project expenses covered by the European grant comply with the eligibility rules as defined in the Grant Agreement signed between the project partnership and the managing authority ([See 7. Administrative preparation; 3/ The Grant Agreement](#)).

Either the project leader or a project partner (even a subcontractor) may be audited. In that case, the organisation has to make available the logistical means requested by the auditor who has been mandated by the European Commission. The auditor must have full access to every original supporting document of whatever nature.

You have to bear in mind that you need to keep every supporting document proving every eligible expenditure related to your project, from the project development to the closure (according to the eligibility period). To a large extent, the supporting documents have to prove that your project has been carried out. You have to keep all the original documents and organise these under budget lines and in chronological order. You should also scan the documents in order to keep a copy in the case the original is lost.

The project leader has to put in place a system within the partnership in order to gather the supporting documents and prepare the payment claims to the competent authority ([See 9.b Lead partner principle](#)). Communication between partners is crucial for meeting funder's requirements and deadlines for payment claims' submission.

Note

- If your organisation is a large one, you need to work with your Financial services;
- You should put in place a codification system for the supporting documents:
 - You could assign a letter for each budget line;
 - You could assign a unique number to each supporting document according to the chronology;
- You should summarise in a table the supporting documents according to your codification system and the date, the object, the supplier and the budget line;
- You need to keep the supporting documents even after the project closure.

Here is a checklist for the supporting documents that you need to keep. Budget lines might vary according to the EU programme. This is a non-exclusive list.

CAPITAL
A/ INFRASTRUCTURE, BUILDING, REFURBISHMENT
Quotes if call for tender
Act of sale or rent receipts
Invoices and receipt
B/ CAPITAL ITEMS
Quotes if call for tender
Invoices and receipts
REVENUE
C/ STAFF
Monthly timesheets
Pay-slips
Copies of the diary for each member of staff involved in the project
Agenda and minutes for each participation to a meeting or a seminar
Signed attendance sheets
D/ FINANCIAL AUDIT COSTS (where applicable)
Quotes if call for tender
Invoices and receipts
E/ TRAVEL AND SUBSISTENCE
Bus, train and flight tickets
Invoices for accommodation and catering
F/ TRANSLATION, INTERPRETATION AND DOCUMENTS
Quotes if call for tender
Invoices and receipts
G/ COMMUNICATION AND DISSEMINATION
Quotes if call for tender
Invoices and receipts
Copies of communication items (e.g. presentations, publications, etc)
H/ SUBCONTRACTING (Communication, audit, translation)
Quotes if call for tender
Invoices and receipts
I/ OVERHEADS
Invoices and receipts
Proof that the method of calculation has been approved by the certifying authority
J/ DEPRECIATION
Proof of the method of calculation
Invoice for each purchased good
K/ CONSUMABLES
Quotes if call for tender
Invoices and receipts
IN-KIND CONTRIBUTION
L/ UNPAID VOLUNTARY WORK
Timesheets
M/ PROVISION OF LAND, REAL ESTATE, EQUIPMENT, RAW MATERIALS
Deed of donation or lease available

For each payment, keep the ORIGINAL proof!
(credit transfer order, check number, etc.)

10

Potential issues

There is no problem, only solutions.

It is not an easy task to implement a project and you may have to face different issues. The table below will give you advice for each of them.

ISSUE	SOLUTION
PARTNERSHIP COORDINATION	
<p>Disagreements between partners</p>	<p>1/ Diplomacy, self-control and discussion: You need to understand what the reasons of the disagreement are if you want to find the best solutions.</p> <p>2/ Roundtable: You should organise a meeting or a video-conference with all the partners and encourage them to get involved in the discussion. The solution has to come from everyone.</p> <p>Maybe one of the partners who is not involved in the disagreement can be appointed as a mediator. In a very serious case, an external mediator can be appointed.</p> <p>3/ Compromise and consensus: it is difficult to find a solution that will meet everyone’s expectations, that is why each partner will have to make an effort.</p>
<p>Lack of communication between partners</p>	<p>1/ Understanding: Is your communication system efficient? Does every partner understand their role within the project and how important communication is?</p> <p>2/ Organising frequent meetings or video-conferences: Meetings are important for sharing the information between the partners and taking decisions about the project.</p>
<p>Lack of involvement of one of the partners</p>	<p>1/ Discussion: You need to understand why the partner is not involved enough in the project. Is it about a lack of resources or a lack of interest and motivation?</p> <p>2/ Roundtable: All the partners have to meet each other and agree a solution. Shall the concerned partner get support from the other ones or leave the partnership and the project?</p> <p>3/ Decision: If the partner wants to leave the project, the partnership will have to inform the funder and make sure they comply with the funder’s requirements regarding partnership.</p>

Note

If you have to modify your project, you will need to refer to the Grant Agreement you have signed before your project starts. Before any request to the funder, bear in mind that time limits may apply. There might also be some restrictions as to how many modifications you can make and what these can be.

ISSUE	SOLUTION
IMPLEMENTATION	
<p>Delays in activities implementation</p>	<p>1/ Understanding: What are the causes of the delay? Is it a lack of resources or a poor time organisation?</p> <p>2/ Re-adapting: Your project needs to be re-adapted in order to catch-up. You should review the project planning and involve more staff or partners on the activities that have been delayed.</p> <p>3/ Modification: You can request a project extension to the funder under specific conditions. Bear in mind that you won't get any extra grant for this extra period.</p>
<p>Objectives are not reached</p>	<p>1/ Understanding: Did every partner understand the project objectives? The partners have to bear in mind that it is a part of the agreement with the funder to reach these objectives (See 7. Administrative preparation; 3/ The Grant Agreement).</p> <p>2/ Adapting: Your project needs to be adapted to ensure that the partners will reach the objectives. The organisation between the partners and the project planning have to be reviewed.</p>
<p>External issues (i.e. illness, maternity leave, resignation of one of the project managers involved)</p>	<p>1/ Putting together the supporting documents: These will be useful to negotiate a project extension with the funder. Furthermore, some EU programmes might finance staff costs during a maternity leave for example.</p> <p>2/ Adapting: See with the partner if a permanently or temporarily replacement can be found. Re-assign the task and re-organise the project planning. You can try to negotiate a project extension with the funder.</p>
BUDGET	
<p>You are over budget</p>	<p>1/ Monitoring: Keep the project financial accounting up-to-date. Identify the problematic budget lines.</p>
<p>You are under budget</p>	<p>2/ Adapting: Re-define the project budget and the grant allocation according to the budget lines when possible. Bear in mind that some EU programmes provides a margin of error on the project budget compared with the initial budget in the bid.</p>
ADMINISTRATIVE DUTIES	
<p>The partners haven't sent the supporting documents for payment claims</p>	<p>1/ Understanding: Is your communication system efficient? Does every partner understand how important payment claims, reporting and evaluation are?</p>
<p>The partners haven't sent the evaluation and reporting information</p>	<p>2/ Reacting: Set-up some deadlines for the partners to send you the information, at least one week before the official deadline for sending the reports to the funder.</p>

11

Project closure

Last but not least.

Project closure is as important as the other steps of your project. Careful consideration should be given to the steps and resources required to close your project.

What you have to do

- You should organise a **final transnational meeting** between the partners ([See 9.c Meetings and events](#)). This last meeting can be organised in a special location for the project, for example in Brussels for a EU project or on occasion of a seminar. It is useful for the preparation of the final report, for the evaluation of the project implementation and for bringing up the project after its completion.
- You have to carry on (until a deadline that the partnership will decide) with the **dissemination** of the project results to the target audience and to the public at a local, national, European, and international level ([See 9.g Dissemination](#)). Don't forget the obligations in terms of publicity (website, deliverables i.e. app, educational packs, equipment, etc.) ([See 9.e Publicity rules](#)).
- In the case of a EU project, you have to send a **final report** to the managing authority. You have to summarise the project's main achievements and assess it. You also have to submit the last financial report up to the closure of the project. You have to send this last report to obtain the last payment of the grant. Each EU programme has its own deadlines, you have to respect these ([See 9.f Reporting rules](#)).

Things to think about

- **Getting rid of equipment/supplies:** Which partner will be responsible for these after the project closure? Should the website be closed or kept? Do check funders' requirements as there will be some expectations on how long these should be kept for.
- **Staff/resources:** What staff do you need to produce final reports and close-out activities?
- **Audit and evaluation:** Has the lead partner received every supporting documents and the evaluation information from the partners?
- **Final payment:** Have the partners done what is necessary to get the final payment?
- **Final reconciliation of funds:** Is the final project budget balanced?

Case study

A final meeting with the parents of the young participants and the local key players can be organised on each side of the partnership. This can also represent the opportunity of organising the final transnational meeting in England for instance as the lead partner is the English ABC organisation.

The bilingual book can be given to the children in order to celebrate the end of the school year and the end of the project. The intellectual property of this book belongs to the partnership but the re-edition can be assigned to the ABC organisation as a lead partner.

The blog of the project won't be kept up-to-date after project's closure but it will still be available on the internet.

12

Project impact

Impact: the mark you are leaving

It is useful to measure the impact of your project in your field and the impact to the beneficiaries, which you will need to evaluate for the final report, especially in the case of a EU project.

The impact is the difference between the situation before your project starts and the situation after the end of implementation. In other words, you have to answer this question: What difference did the project make?

The best way to evaluate this impact is an ongoing and relevant evaluation from the very beginning to the end of the project ([See 9.d Evaluation](#)).

To measure this impact, you need to refer to the evaluation carried out before your project started (ex-ante evaluation) as well as to milestones that you have defined throughout your project (for example every three months, or after the implementation of a work package).

It will be very difficult to measure the impact of your project without a properly handled evaluation process.

This step represents a good opportunity for your organisation and their partners to see what has been achieved, the positive points during the implementation and what could be improved. Moreover, partners may want to carry on with the partnership and potentially work on new projects ? ([See 1. The idea](#)).

Case study

The D - liREading project helped the children to be more self-confident and to enjoy going to the library and reading books. The workshops with their parents strengthened their relation and reading a book with them became a real moment of pleasure. The results at school improved and the children pay more attention in the classroom.

The schools decided to continue the visits to the library on a weekly basis and the visits of the storyteller on a monthly basis. The children will have the possibility to carry on writing to their friends. The schools will inform their partner of their activities related to reading.

The partnership considers the possibility to work together again on a new project on culture or theatre for instance.

To be continued...

ANNEXES

A

Project management software

They will change your life!

On the internet, you will find plenty of software that can help you to develop and manage your project. Some of them are free to use, others are not. Each one has specific options which could meet your needs.

You may find them useful for the SWOT analysis, the preparation of a meeting, or the development of a Gantt chart as shown in the example below.

You will find below a quick presentation of some software that you may find useful...

1/ XMind	
<ul style="list-style-type: none"> • Mind mapping; • Gantt view available but not in the free version; • No progress reports editor; • No task assignment with Outlook; • Few templates available. 	
Price	Free version (limited tools) XMind Plus 2013: £54 XMind Pro 2013: £69

2/ Microsoft Visio	
<ul style="list-style-type: none"> • Diagrams, charts and workflows; • No mind mapping; • No Gantt view. 	
Price	£108.38

3/ MindGenius	
<ul style="list-style-type: none"> • Intuitive mind mapping; • Many templates available (support in project development, time saving and avoiding omissions); • Complete Gantt view available (monitoring project progress, identifying needs and threats) ; • Progress reports editor (time saving regarding EU projects reporting); • Task assignment with Outlook (better communication within the management team, time saving); • Export to different Microsoft file types (Excel, PowerPoint, Word, etc.); • Useful software for every staff member (not only for External Funding Team). 	
Price	Single User Licence: £147 5 User Licence: £700 10 User Licence: £1370

B

How to develop and submit your project within two weeks

Yes you can!

You have a project and you need to find some funds, or you have identified a call for projects for a funding programme you are interested in. The thing is the deadline for this call will be in two weeks time! Don't worry, it is possible to deal with this but it won't be easy. In this part, you will find some advice to be as well organised as possible and manage your time effectively.

1/ Project development (See Parts [1](#); [2](#) and [4](#))

Before you write the bid, you have to ensure that you have identified the **context**, the **objectives**, and the **activities** of the project. This information will help you a lot for the bid writing and as a result will save you some valuable time!

Two situations can arise here:

A/ Your project is defined

You know exactly what the context, objectives and activities of your project are. You can go directly to the next step.

B/ Your project is not defined

You know the topic and the main objective of your project ([See 1. The idea](#)) but this is not sufficient.

As a reminder, four project development tools were outlined to you at the beginning of this handbook ([See 2. From the idea... to the project](#)) to help you to develop your project:

- The root cause analysis;
- The state of the art analysis;
- The SWOT analysis;
- The logical frame.

If you had to keep only one of these because of a lack of time, it would be the logical frame. This tool will help you identify the basic information for the application process. If this exercise is too difficult for you, you can try to do the root cause analysis first.

2/ Partnership ([See 5. Application process; 1/ Partnership](#))

If the partnership is one of the funder's requirements, you will need to find partners. For reasons of trust, it would be easier to work with partners you already know, and possibly you have already worked with. Your partners have to be able to quickly understand the project and to be able to get involved directly in it as soon as possible. If you don't have any partner at this point in time, you can try to find one on LinkedIn within specific groups or on dedicated platforms on the internet (See funding programme's website).

3/ Application process ([See 5. Application process](#))

Once your project is defined and your partners identified, you can proceed to the bid writing. First of all, **be sure your project meets every funder's requirement**. Where time is pressing you will have no choice but going straight to the point in your bid, however, you need to make sure that you are answering the questions correctly and you have read the guidelines thoroughly.

Be careful with the information and the documents that you need from your partner(s). You should inform them as soon as possible and set up a specific deadline for them in order to be ready for your bid submission.

Please consult [Part 5. Application process](#) of this handbook for further advice on this.



Note

Setting up a project purely to get a grant is risky. You have to ensure that your project will fulfil the expectations of the funder. Moreover, the implementation of the project will be easier if you know where you are going with your partners. In any case, you should not skip the project development phase.

It might be smart to wait for the next call for projects if you feel you are not quite there yet.

C

European projects Special: How to manage the conversion between the Pound and the Euro

Something worth bearing in mind!

Every grant from the European Commission will be assessed and dealt with in Euro.

Project leaders and partners who are established within the European Union and outside the Euro-Zone, or even an organisation established in a country that is not a member of the EU will have to take this into account right from the development phase of their project.

1/ Estimations when applying for funding

During the application process, you need to estimate your budget. First, you should start to calculate the budget in Pound and then make the conversion to Euro through the [official website](#) of the European Commission. You will need to refer to the month when you are working on the budget estimate for the conversion.

In your project budget table, insert one column for Pound and another one for Euro.

2/ Grant Agreement


First of all, you have to review your budget estimate as the grant might be lower than your expectations. Moreover, the exchange rate will have changed since the application process. You need to update your calculation budget using the dedicated website by referring to the month when you are doing the update.

3/ Project implementation

During the project implementation, you will have to manage your budget for each partner, each month of its implementation and for each budget line.

For partners who are not within the Euro-Zone, you will have to calculate their budget in their national currency and then convert this into Euro with the official website, by referring to the month when the expense was made.

The [official website](#) of the European Commission is available for conversions between Euro and other currencies.



The screenshot shows the European Commission's 'InforEuro' website. The main heading is 'FINANCIAL PROGRAMMING AND BUDGET'. A navigation menu includes 'the budget explained', 'figures', 'documents', 'library', 'contracts and grants', and 'InforEuro'. The 'InforEuro' section is titled 'Monthly accounting rate of the euro' and lists several options: 'Direct access by currency (ISO code) or by country (geonomenclature)', 'Access by list of countries', 'Access by list of currencies', 'Monthly rates' (set to 2014 and 6), and 'More about InforEuro'. A 'Currency converter' tool is highlighted with a red circle. It shows a conversion of 1 EUR to 0.811 GBP for the year 2014 and month 6. The 'Official euro site' link is visible at the bottom right.

http://ec.europa.eu/budget/contracts_grants/info_contracts/infoeuro/infoeuro_en.cfm

Note

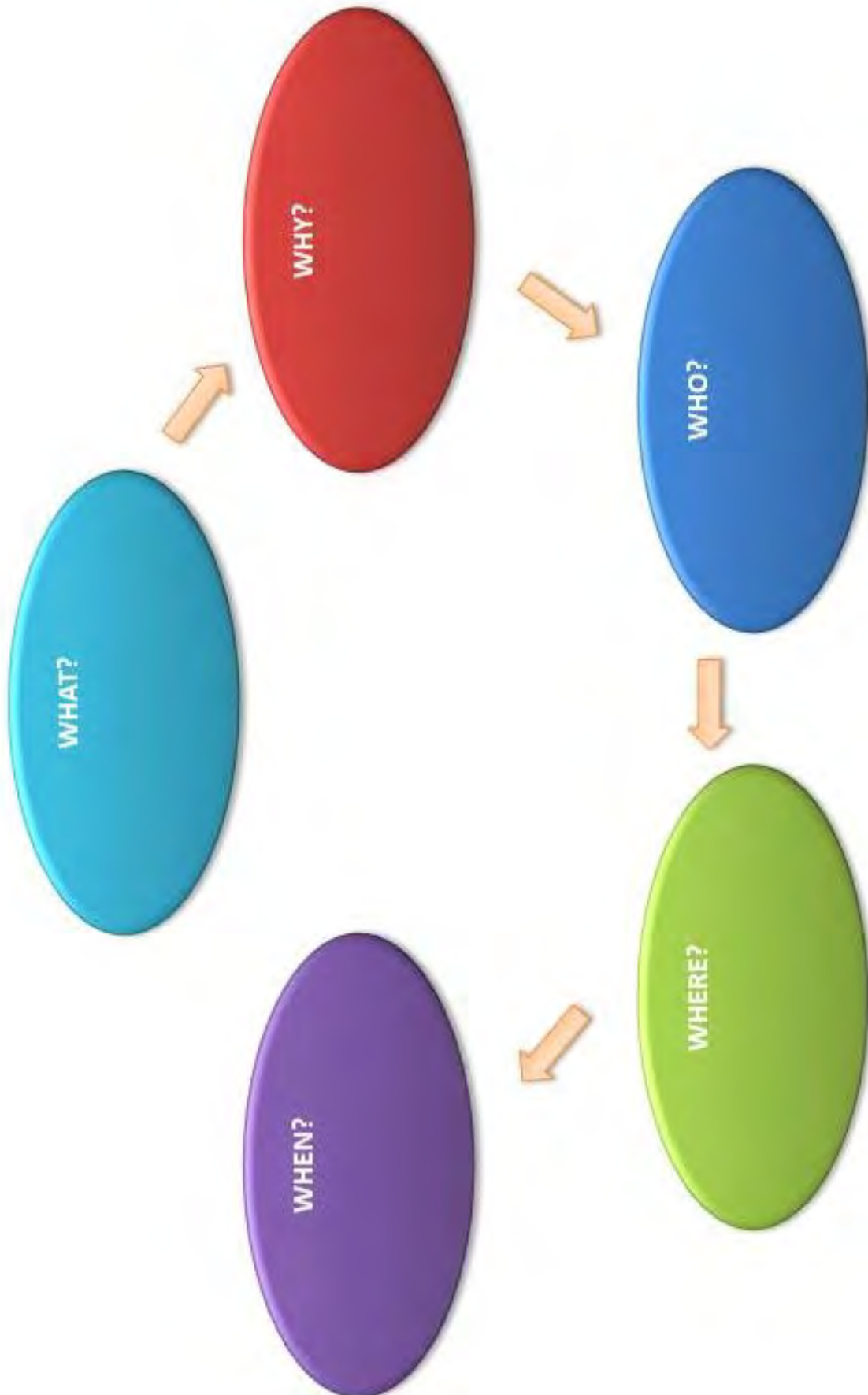
Conversion rules to be applied during the project development and management phases are defined within the EU programme guidance. Moreover, this should be reminded in the Grant Agreement between the funder and the partnership.

The conversion method may vary according to the EU programme.

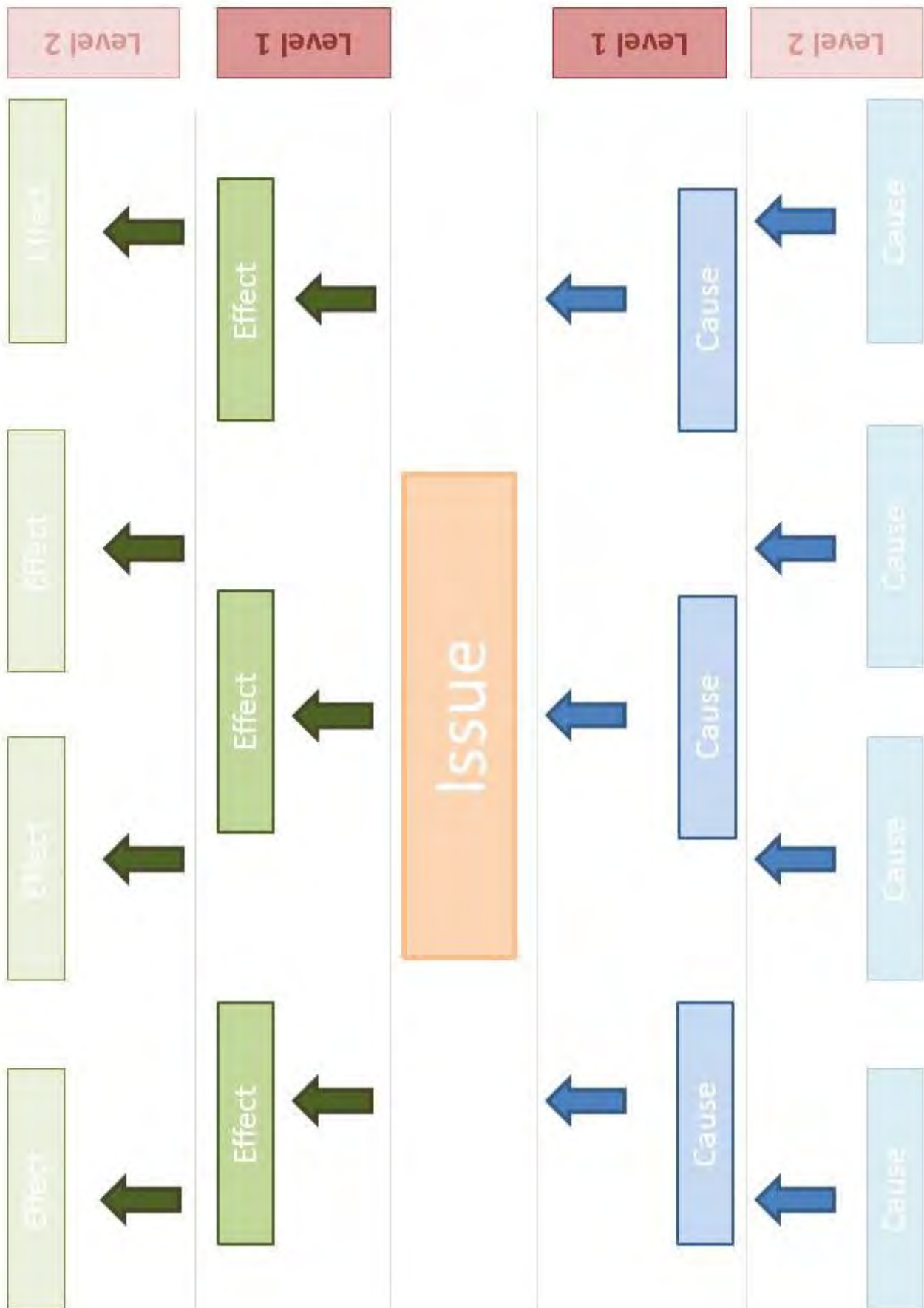
Please note that an exchange rate may have an impact on a larger project taking place over a longer period of time.

Working documents

To be printed, shared and scribbled on



1/ The root cause analysis



2/ The state of the art analysis

PRESS ARTICLES

--

SIMILAR PROJECTS ALREADY CARRIED OUT

--

UNITED NATIONS / EU / NATIONAL POLICIES

--

STATISTICS

--

STUDIES

--

EXPERT ORGANISATIONS

--

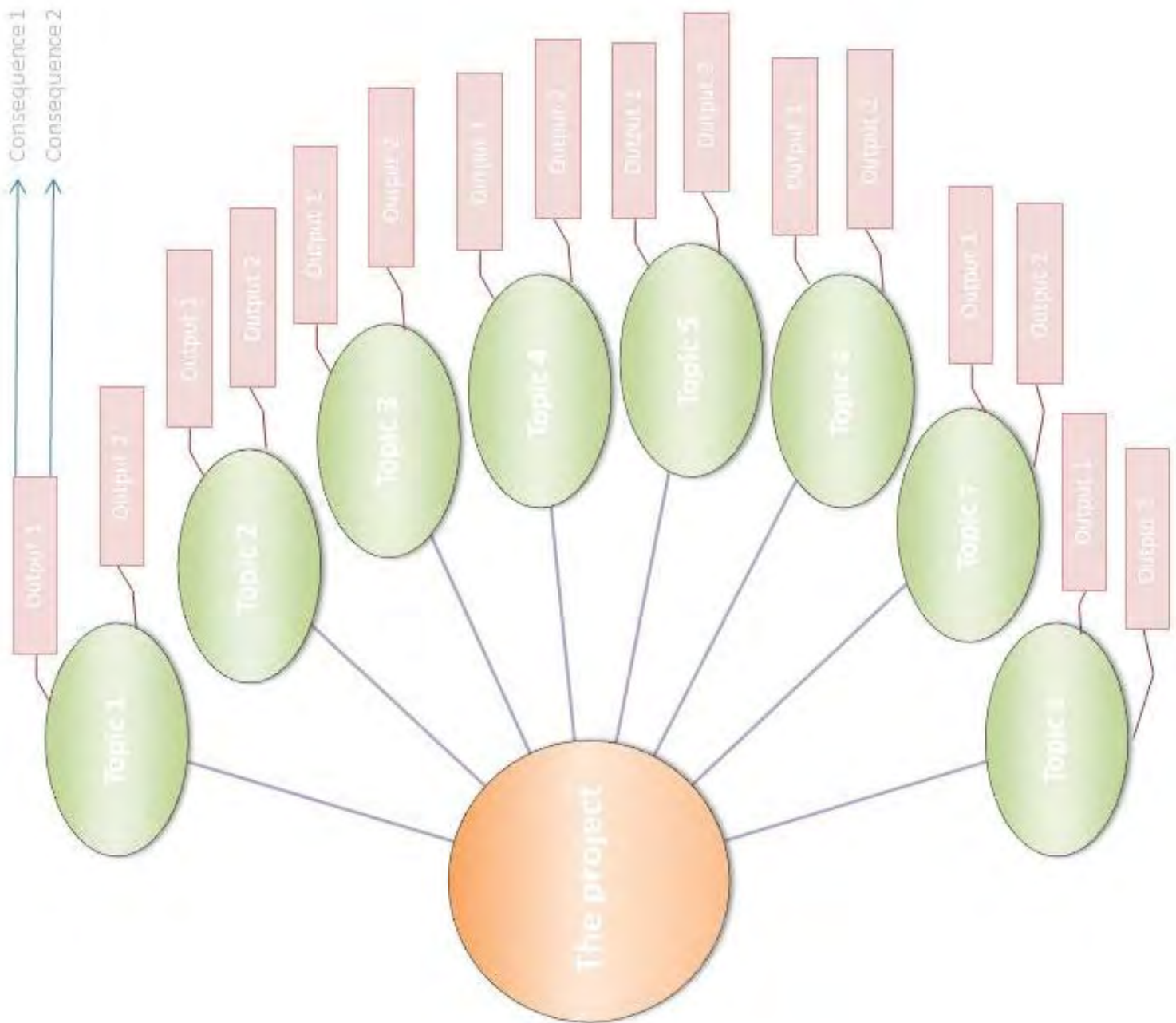
3/ The SWOT analysis

I N T E R N A L	E X T E R N A L
<p>WEAKNESSES</p> <ul style="list-style-type: none"> • • • • 	<p>THREATS</p> <ul style="list-style-type: none"> • • • •
<p>STRENGTHS</p> <ul style="list-style-type: none"> • • • • 	<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • • • •
I N T E R N A L	E X T E R N A L

4/ The logical frame

	PROJECT SUMMARY Description	SETTING INDICATORS Indicators to check the good implementation of the project.	MONITORING INDICATORS How to check the indicators?	ASSUMPTIONS Assumptions regarding the implementation of the project
GOAL Main objectives of the project	7			X
OUTCOMES Specific objectives of the projects	5			6
OUTPUTS Results of the activities	3			4
ACTIVITIES Activities to be carried out during the implementation of the project	1			2

Brainstorming



4

How to adapt the project to funder's requirements



2/ The Work Plan

TIMESCALE	January	F	M	A	M	J	J	A	S	O	N	D	Etc.
	(or month of your project start date)												
Work Package 1													
Work Package 2													
WP3													
WP4													
WP5													
Etc.													

Project monitoring: Gantt chart

Task name	Start date	Expected duration (in days)	Expected end date	Number of days since start date	Number of days until expected end date	Days over-due	Effective end date	Assigned to	Predecessor
Project title									
1 WP1									
2 Action 1.a									
3 Action 1.b									
4 Action 1.c									
5 WP2									
6 Action 2.a									
7 Action 2.b									
8 Action 2.c									
9 Action 2.d									
10 WP3									
11 Action 3.a									
12 Action 3.b									
13 Action 3.c									
14 Action 3.d									

	Month 1		Month 2		Month 3		Month 4		Sub-total	
	£	€	£	€	£	€	£	€	£	€
INCOME										
LEAD PARTNER										
Funder A									£0.00	€ 0.00
Funder B									£0.00	€ 0.00
Funder C									£0.00	€ 0.00
Own-resources									£0.00	€ 0.00
In-kind contribution (capital)									£0.00	€ 0.00
In-kind contribution (revenue)									£0.00	€ 0.00
Donations									£0.00	€ 0.00
Direct income generated by the project									£0.00	€ 0.00
Sub-total A.1	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00
PARTNER A										
Funder A									£0.00	€ 0.00
Funder B									£0.00	€ 0.00
Funder C									£0.00	€ 0.00
Own-resources									£0.00	€ 0.00
In-kind contribution (capital)									£0.00	€ 0.00
In-kind contribution (revenue)									£0.00	€ 0.00
Donations									£0.00	€ 0.00
Direct income generated by the project									£0.00	€ 0.00
Sub-total A.2	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00
Sub-total A (A.1 + A.2)	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00
EXPENDITURES										
LEAD PARTNER										
CAPITAL										
A/ Infrastructure, building, refurbishment									£0.00	€ 0.00
B/ Capital items									£0.00	€ 0.00
REVENUE										
C/ Staff									£0.00	€ 0.00
D/ Financial audit costs (where applicable)									£0.00	€ 0.00
E/ Travel and subsistence									£0.00	€ 0.00
F/ Translation, interpretation and documents									£0.00	€ 0.00
G/ Communication and dissemination									£0.00	€ 0.00
H/ Subcontracting									£0.00	€ 0.00
I/ Overheads									£0.00	€ 0.00
J/ Depreciation									£0.00	€ 0.00
K/ Consumables									£0.00	€ 0.00
Sub-total B.1	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00
PARTNER A										
CAPITAL										
A/ Infrastructure, building, refurbishment									£0.00	€ 0.00
B/ Capital items									£0.00	€ 0.00
REVENUE										
C/ Staff									£0.00	€ 0.00
D/ Financial audit costs (where applicable)									£0.00	€ 0.00
E/ Travel and subsistence									£0.00	€ 0.00
F/ Translation, interpretation and documents									£0.00	€ 0.00
G/ Communication and dissemination									£0.00	€ 0.00
H/ Subcontracting									£0.00	€ 0.00
I/ Overheads									£0.00	€ 0.00
J/ Depreciation									£0.00	€ 0.00
K/ Consumables									£0.00	€ 0.00
Sub-total B.2	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00
Sub-total B (B.1 + B.2)	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00
Net cash balance (Sub-total A - Sub-total B)	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00	£0.00	€ 0.00